PROGRAM OVERVIEW Definitions	3 5
ACCESS VOLUNTEER MATTERS CAMPUS ADMINISTRATOR FUNCTIONS	7
Request Administrative Rights	8
	9
Add Custom Cradentials	9
Add Custom Credentials	
Credential Description and Duration	10
View Credential Set Up Description in Volunteer Matters	12
Audit Credential Set-Op Description in Volunteer Matters	
	15
Create Volunteer Project	
Assign Project Organizer	20
Assign Organizer to an existing Project	22
Add Project Needs - Positions	24
Risk Profile/Position Roles	24
Position Descriptions	25
Add Shifts, Tasks, Items	27
Assign Project Volunteer	28
Invite Project Volunteer	29
Monitor Volunteer Assignment Status	34
View Credentials Dashboard Contents	34
Update Review Action Statuses	35
Dashboard Status Options	35
Submit Reminder Notifications	
Understand Status Descriptions	
Change Credential Status	38
Change/Update Credential Status	
Add Attachment to Credential	
Non-Compliant Status	39
Monitor Criminal Background Check	40
Resend CBC Invitation from HireRite	40
Create New Order in HireRite	40

Change CBC Expiration Date40
CBC Negative Findings Review
Navigate the System43
Change Project Set Up43
Project Notifications45
Reporting Tools46
Assignment Roster Report
Credential Conflict Report48
Send Email/Text Message from Per Project Assignment Roster Report
Reference: Advertise Your Program
Reference: Contact Database Functions
Manage Contact Promes
Using Contact Database54
Create Views
Reference: Job Aid Resources
Reference: Hire Rite Adjudication
Reference: Project Catalog63
Reference: Volunteer Guide
Reference: Volunteer Required Training List
Reference: General Volunteer Processing
Volunteers in POT Email Request69
Marinette Theatre70

PROGRAM OVERVIEW

Volunteer Matters is a software system that allows institutions a mechanism to document University volunteers and/or staff/volunteers of youth activities. Volunteer Matters (VM) is not required to be used by an institution. VM allows volunteers and/or staff to register for an activity and complete screening and training requirements.

The institution must have an annual registration process for covered activities to satisfy requirements of UW System Policy 625, Section 6.C.1. This information includes collecting for each activity: 1) the date and time of activity, 2) primary contact, and 3) authorized adult names, contact, screening and training.

The VM system links directly to HireRite, which is the portal that allows staff to compete a Criminal Background Check as part of certain volunteer requirements. This training guide provides details on using the VM system.

VM Features

- Add Volunteer Activities for public invitation
- Customize activity (project) volunteer requirements
- Customize credentials (requirements) for volunteer positions, e.g. training videos, CPR
- Portal for volunteer/staff to accept an activity (position) invitation and complete requirements
- Links to HireRite for Risk Profile Criminal Background Checks

Campus Administrator

- 1. Request Administrative Rights
- 2. Set Up Credentials
- 3. Manage Contact Database

Program Organizer/Director

- 1. Create Projects
- 2. Update Project Set Up Details
- 3. Assign Project Organizer
- 4. Create Project Needs (positions, credentials)
- 5. Assign Volunteers
- 6. Send Invitations
- 7. Monitor Credential Assignments
- 8. Use Reporting Tools
- 9. Manage Contact Database

Volunteer

- View Volunteer Dashboard for assigned activities
- Find a Volunteer
 Opportunity or
 "Project"
- Complete Volunteer Project Assignments
- Update Profiles

Program Access Help

UW Shared Services is available to assist with the following:

- Add new administrators or project organizers
- Add/update campus-specific onboarding credentials
- Make changes to system configuration (application forms, database configuration, portal branding, default messaging)

VM System Contact:

serviceoperations@uwss.wisconsin.edu 888-298-0141

HireRite Help:

angela.schultz@uwss.wisconsin.edu

Volunteer Matters Help: Emailsupport@volunteermatters.comVolunteer Matters Calendar Invite:Support Quick Call

Process Flowchart



Note: non-youth volunteers bypass the Camp Office actions.

See also Reference - HireRite Adjudication.

Definitions

Campus Administrator: the individual assigned campus access with administrator rights to create new volunteer projects and manage credentials.

Program Organizer: the individual coordinating the activity, like a Camp Director or designee. It is the Program Organizers responsibility to create the activity, manage profiles and credentials, and monitor volunteer invitations. The Campus Administrator will create a project and assign to a Program Organizer.

Credentials: the documented requirements a volunteer is required to obtain to hold a position. Credentials are set by the Program Organization. Specific credentials not listed within VM are added by the Campus Administrator through UW System Shared Services. Credentials include electronic agreements, certifications needed for the position, criminal background checks, and training.

General Volunteer Project: a project designated as the placeholder for general volunteers that are outside of youth activities. These volunteers only receive the General Volunteer Agreement. This project is always labeled by year: 2024 General Volunteers

Invitation: once a volunteer selects interest in a project volunteer position, they will receive an invitation, which directs them to complete the required credentials for that project's position.

Risk Profile: this describes the assigned risk profile – or **position** - for a project volunteer position. These profiles – or positions – range from basic: one-time volunteer, Authorized Adult, or Designated Adult to targeted positions such as Health Services Staff or Camp Director. Each profile is assigned specific Credentials. Targeted profiles will need to be created within Volunteer Matters.

Project: this refers to a covered activity, or program that Camp Director needs volunteers for. Unlike the YARS System, a Project is the covered activity – or session – not the program. A project is any event, program or initiative around which you would like to organize volunteers. You must be an 'administrator' in order to create projects. Projects have a description (name, image, summary, goals, contacts, address, etc.), they have categories (areas of focus, intended beneficiaries, impact areas, etc.), they have rules for publishing the project in the Project Catalog, and they have Needs (the things people are actually signing up for – shifts, tasks, items, positions). 'Organizers' can edit, manage assignments to, and report on projects. However, an administrator must assign them to the project first.

Project Catalog: the catalog contains all active and published volunteer projects that have current/future needs from which an individual can select to volunteer. The project catalog is the central resource for volunteers to search, browse and sign-up for your volunteer project needs. When you advertise for prospective or registered volunteers to sign-up to help, you are typically asking them to visit the Project Catalog in order to find a need they would like to fulfill. The project catalog shows all projects that have current or future needs, whose publish start date is on or before today, whose publish end date is on or after today, and that is not hidden. When creating a project you can specify the publish dates as well as a publish mode that determines which types of users should see the project in the catalog (public, volunteers, administrators, or hidden).

Project Dashboard: Each project in VolunteerMatters includes a "Project Dashboard" to provide a high level view of project analytics and data for administrators and organizers. The available summary information panels are:

- Project Details
- Project Impact
- Project Staffing (Next 30 Days)
- Needs With Invalid Credentials
- Recent Assignments (Past 7 Days).
- Email Notification

Project Needs: There are four types of needs you can add to a project. You should add needs of at least one type but you may have multiple types of needs. Needs can be shifts, tasks, items, or positions.

Project Need: Shifts: Needs where a volunteer is expected to work a specific role (job) during a predetermined time slot (specific date and time). A project may have many different roles (e.g., greeter, helper, worker, cleaner) or you may have one role to which all people may be assigned.

Project Need: Items: Needs where you are asking volunteers to donate or lend item(s) to your cause (food, tools, clothing, etc.). You may define the total number of a particular item you need and the volunteer can specify how many they will bring. Items have a due date as to when you expect them to be delivered.

Project Need: Tasks: Needs where you are asking a volunteer to "do" something but the work can be done according to the volunteer's schedule. You are only asking the task be completed by a specified date.

Project Need: Positions: A position is a long-term commitment to take on a more staff-like role for the project or organization. An example might include a volunteer manager, project chair, or committee member. Volunteers would be committing to this position for a period that spans days, weeks, months, or even years. This is quite different from a "role" which describes a particular job relating to shift work. Many times, the work related to a position is unscheduled and therefore done on a volunteer's own time.

Project Assignments: Once someone signs-up for a need or they are appointed by an administrator they are "assigned" to that need. When we manage assignments this means we are managing those who are or will be assigned to a specific need on a project.

ACCESS VOLUNTEER MATTERS

There are four types of users for VolunteerMatters:

Administrator	https://uw.volunteermatters.org/login	Login to update Credentials and Risk Profiles
Program Organizer	https://uw.volunteermatters.org/login	Use Login for UW Employees and Students to add and manage Projects (Camps)
University Employee/Volunteer	https://uw.volunteermatters.org/login	Login for UW Employees and Students to search for a volunteer opportunity
Public Volunteer	https://uw.volunteermatters.org/register	First time user must register
	Volunteer Matters Project Catalog	Open the VM Project Catalog to search for a volunteer opportunity by campus



Volunteer Initial Login

Volunteer Registration		Volunteer Project Catalog	
	Create Your Login Information	UW-Eau Claire University of Wisconsin Eau Claire Chucse	UW-Extension

Volunteer Matters Help Desk: <u>support@volunteermatters.com</u>

Schedule Zoom Call: : https://calendly.com/volunteermatters-support/enterprise-support-quick-zoom

CAMPUS ADMINISTRATOR FUNCTIONS

Summary Duties

- Request Administrative Rights
- Set Up Credentials [Manage/Audit Credentials PDF]
- Manage Contact Database

General Volunteers Outside of Youth Activities: Refer to Reference – General Volunteer section at the end of this SOP aid.

Request Administrative Rights

Contact UW Shared Services for any requests to add administrative rights for other individuals on your campus.

- 1. Request the *Request Additional Administrative Rights and Credentials Template* from UW System Shared Services
- 2. Fill out the Administrative Rights tab
- 3. Submit to <u>ServiceDesk@support.wisconsin.edu</u>

Manage Credentials

Use the Manage/Audit Credentials PDF or follow instructions below.

Credentials are assigned to volunteers based on their risk profile – or position. The risk profile determines what type of credentials the volunteer will need. A credential is a requirement a volunteer must attain or complete in order to perform certain actions within the volunteer portal. Some credentials are global and are required of all volunteers (signing a waiver, agreeing to a code of conduct, attending a training) and other credentials must only be attained or completed to sign up for a specific project need (e.g.: training, background checks, etc.).

The Pre-College Liaison is responsible for managing the credentials within the Volunteer Matters System, this includes 1) managing volunteers who have been assigned credential tasks to complete prior to a covered activity, and 2) adding custom credentials to VolunteerMatters (see next section).

Only a Precollege Liaison and UW Shared Services can adjust credential statuses. The credential set up will determine if you can edit an expiration date.

Configure Email Preferences

Configure your credential email preferences in 'My Profile' to send daily emails AND/OR visit the credential dashboard daily to review any credentials with a '*Review'* status. Most credentials will automatically move into an Approved status. But there will be instances where some additional administration is needed. See the next steps below for those. For assistance in setting credential email preferences within VolunteerMatters, see https://support.volunteermatters.com/hc/en-us/articles/233072748.

Add Custom Credentials

A custom credential is required when there is a unique requirement or training for a position, such as an Archery Instructor. Use the <u>Request Custom Credentials PDF</u> or follow instructions below.

Contact UW Shared Services for any requests for additional credentials custom for your campus.

Credentials can be set up to automatically approve upon application (e.g., electronically signing an agreement) or have an approval process (an administrator must review documentation before granting approval or integrated approval with a 3rd party provider).

- 1. Request the *Request Additional Administrative Rights and Credentials Template* from UW System Shared Services
- 2. Fill out the *Extra Credentials* tab form

			_		
Campus	Credential Name	Credential Description	Credential Type	Volunteer Instructions	Agree-To Statement
TABLE IN THE	CPR Certification	CPR Certification required for volunteers	Certification	Complete CPR Certification and upload your	I agree to provide my CPR Certifica
UW-Green Bay		serving as health supervisor staff.		certificate from American Red Cross or American	

3. Submit to <u>ServiceDesk@support.wisconsin.edu</u>

Note: Any changes where credential has a certificate file attached cannot be changed by VM through a mass format file, otherwise the certificate will be deleted. For these changes you must complete them manually, one volunteer at a time.

See Credential Instructions Section and the Credential Description Section for content language.

Credentialing Set Up Instructions

The following credential settings are part of the template:

Field	Description
Credential Name	What the Project Director will assign to a volunteer.
	Example: UWGB Medication Management
Credential Type	 Electronic Agreement (one they will electronically sign in the system) Certificate (convine DDE valued)
	Certificate (requires PDF upload)
	Video Extra Training
	Embedded Training
	Almost all custom credentials will be either in 3 sections: Agreement, Certification, or Learning.
	For a high level view of credentials click here.
Active Status	Change to TRUE, unless existing Credential you wish to remove from active status, in that case
	change to FALSE
Volunteer Instructions	These are the instructions for the volunteer on how to complete the credential or what they need
	to do. These instructions are available when the credential is being applied for and from the
	credential on the volunteer's profile. If you add a full URL to these instructions, it will be converted
	to a clickable hyperlink. Refer to Credential Description section below for examples of written
	Instructions to copy and paste.
	Example: Volunteer will review the Camp Operations Guide and understand and perform the
	procedures outlined within during the program. This includes check in/check out, medication
	disbursement, reporting incidents and to whom, and other camp operation procedures. The Guide
	may also be found on the <u>Youth Protection - Compliance - Safety, Risk and Compliance (uwgb.edu)</u>
	webpage.
Agree-To Statement	This is the language that the volunteer is consenting/agreeing to. This is where you add the
	language to which the volunteer should agree/attest. After the application process, this statement
	is shown on the credential on the contact record and on the volunteer's my profile page (the exact
	language to which they attested).
	Example: Lunderstand that participation as a volunteer requires me to adhere to the practices and
	procedures outlined within the Operations Manual on the UW-Green Bay campus. I have read.
	understand, and agree to abide by Operations Manual as part of the responsibilities of the
	volunteer position.
Signature Type	This setting is what will be displayed to the volunteer and what is required from them to submit.
	The options are:
	 <u>None</u> - You may present an "Agree-To" statement that is implicitly affirmed by the fact that it
	will be presented to the volunteer but they only have to click "continue" to proceed. This
	should not be used for any agreement or credential where an explicit affirmative response is
	Checkbox - The volunteer simply needs to check a box to agree
	 Initials - The volunteer needs to enter their initials to agree.
	 Full Name - The volunteer needs to enter their Full Name to agree.
Allow File Upload	Determines whether to allow the Volunteer to upload files to be attached to the credential
	application. <u>Click here for more information on credential file uploads.</u>
Credential Always	This determines if the credential is required of ALL volunteers. This will make it part of the
Required	application process and will be applied automatically to all project needs (roles/positions). Those
	not required will be placed on specific project needs when they are necessary.
Default Status	This is the initial status for your credential after the volunteer applies for the credential. Business
	rules for certain situations may override this setting. <u>Click here for more information on the</u>
	amerent statuses.
	 Approved (no approval process required - typically for electronic agreements only)

Field	Description
	• Review (a precollege liaison must review and approve). Use this setting if you want to set
	expiration dates and/or review certificates that have been uploaded (e.g. Lifeguard Cert).
	• Submitted (typically reserved for a multi-step review process where an precollege liaison may
	have to take some sort of action internally before marking it for review)
Expiration Policy	 This setting allows you to determine the manner in which the credential is automatically expired by the system. Credentials set to "None" are forever (once they attain the credential it never has to be repeated). Any credentials that expire over time, set either "Duration" or "Annual" according to your needs. Settings to select from include: None: use this setting to allow update/change of expiration dates within the system. Use of this setting means the oversting date is ALWAYS BLANK
	 Duration: Set the credential to expire after X number of months, e.g. 24 (2 years). This will be placed in the "Expires After" field below "Expiration Type".
	 Annual: Allows you to set a month and date that the credential will expire each year. This will be placed in the "Expiration Month" and "Expiration Day" fields below "Expiration Type".
Expires After	Enter the automatic expiration date language.
	Example: 2 Years from today
	The system will not allow you to update/edit this date later. Do not use this and Expiration Policy
	for any credential that you may need to edit an expiration date to.
Expiration Month	Example: Month Uploaded
Expiration Day	Example: Date Uploaded
Exemption Age Direction	This value is used to determine exemptions for this credential based on age. The value of this field, in conjunction with the "Exemption Age Limit" value, determines if a volunteer is exempt.
	BelowAbove
	If "Exemption Age Direction" is "Below," then a volunteer with an age below the "Exemption Age Limit" will be exempt until they reach that age. If "Exemption Age Direction" is "Above," then a volunteer with an age above the "Exemption Age Limit" will be exempt from the credential (without expiration). However, if a precollege liaison updates the credential, other expiration policies may apply.
	If you want the credential to not be exempt, set exemption asExemption:BelowAge Limit:0
Exemption Age Limit	This value is used to determine exemptions for this credential based on age. The value of this field, in conjunction with the "Exemption Age Direction" value, determines if a volunteer is exempt. If "Exemption Age Direction" is "Below," then a volunteer with an age below the "Exemption Age Limit" will be exempt until they reach that age. If "Exemption Age Direction" is "Above," then a volunteer with an age above the "Exemption Age Limit" will be exempt from the credential (without expiration).

Credential Description and Duration

Credentials assigned to positions have been set up in the system for the following expiration dates and instructions:

Credential	Training Review	Duration of	System Set Up Description
CBC	Completed through	2 Years Overnight	
CDC	HireRite	4 Years Day Camp	
Youth Agreement	Electronic Signature	1 Year	I have read, understand, and agree to abide by this agreement as part of my participation in this activity. Download a printable copy of this agreement for your records at (<u>https://www.uwqb.edu/getmedia/7b3c6bfa-8f89-</u> <u>4787-9e65-46219c995445/Youth-Event-</u> Agreement.pdf).
Youth Agreement Minor	Uploaded Certificate	1 Year	Participants must provide a copy of their agreement to upload for this credential. You may click "I will upload file(s) later" and upload the file from your profile after completing this training. You may do so by returning to "My Profile" in this Volunteer Portal. Your credential will not be considered complete until you upload the certificate.
Operations Manual	Electronic Signature	2 Years	Volunteer will review the <u>Camp Operations Guide 2025</u> and understand and perform the procedures outlined within during the program. This includes check in/check out, medication disbursement, reporting incidents, and other camp operation procedures. The Guide may also be found on the UWGB Youth Protection webpage at <u>Youth Protection - Compliance - Safety, Risk and Compliance</u> .
Mandated Reporter	Electronic signature after watching video	4 Years	View the Mandated Reporter video link and sign the electronic agreement. (https://mediaspace.wisconsin.edu/media/Mandated+R eporter+Training/1 3ird8mui
Preventive Sexual Harassment	Electronic signature after watching video	4 Years	View the Preventing Sexual Harassment and Violence video link and sign the electronic agreement. (<u>https://mediaspace.wisconsin.edu/media/Sexual+Violence+and+Harassment+Prevention+Training/1_u3o03564</u>)
Youth Protection	Electronic signature after watching video	4 Years	View the Youth Protection videos and sign the electronic agreement. Links: Youth Protection Training - Introduction Youth Protection Training - How Abuse Happens Youth Protection Training - Appropriate Interactions Youth Protection Training - Abuse Prevention Supports
CPR Certification	Uploaded Certificate	2 Years from date of Certificate System is set for automatic, which is blank; must enter a date	Participants must provide a copy of their certificate to upload for this credential. You may click "I will upload file(s) later" and upload the file from your profile after completing this training. You may do so by returning to "My Profile" in this Volunteer Portal. Your credential will not be considered complete until you upload the certificate.
Medication Management	Uploaded DPI Certificate	2 Years	Participants must save a copy of their documentation of the assessment test and passing grade to upload for this credential. <u>Click here to take the training</u> . You may click "I will upload file(s) later" and upload the file from your profile after completing this training. You may do so by returning to "My Profile" in this Volunteer Portal. Your credential will not be considered complete until you upload the certificate.
Epi Pen/Anaphylaxis	Uploaded Certificate	 4 Years from date of Certificate System is set for automatic, which is blank; must enter a date Note: American Red Cross Certificates are good for only 2 yrs 	Participants must provide a copy of their certificate to upload for this credential. You may click "I will upload file(s) later" and upload the file from your profile after completing this training. You may do so by returning to "My Profile" in this Volunteer Portal. Your credential will not be considered complete until you upload the certificate.

Credential	Training Review	Duration of	System Set Up Description
Lifeguard	Uploaded Certificate	1 Year from date of Certificate	Participants must provide a copy of their certificate to upload for this credential. You may click "I will upload file(s) later" and upload the file from your profile after completing this training. You may do so by returning to "My Profile" in this Volunteer Portal. Your credential will not be considered complete until you upload the certificate.
Archery	Uploaded Certificate	1 Year from date of Certificate	Participants must provide a copy of their certificate to upload for this credential. You may click "I will upload file(s) later" and upload the file from your profile after completing this training. You may do so by returning to "My Profile" in this Volunteer Portal. Your credential will not be considered complete until you upload the certificate.
General Volunteer Agreement	Uploaded Certificate	1 Year from date of Certificate	Participants must provide a copy of their agreement to upload for this credential. You may click "I will upload file(s) later" and upload the file from your profile after completing this training. You may do so by returning to "My Profile" in this Volunteer Portal. Your credential will not be considered complete until you upload the certificate.

View Credential Set-Up Description in Volunteer Matters

To view the set up instructions to a credential, open Administrator's Profile and click on the green credential button to open a specific credential up. This will provide you with the details of what the volunteer views when viewing the credential and what they are agreeing to.

, Active Credenti	als
æ	Mandated Reporter Training Status: Approved Start: 2024-03-15 Expiration: 2026-03-15
\bigcirc	Preventing Sexual Harassment and Violence Training Status: Approved Start: 2024-03-15 Expiration: 2026-03-15
æ	Youth Protection Training Status: Approved Start: 2024-03-15 Expiration: 2026-03-15

Statement as Acknowledged Description

Youth Protection Training
Status
Approved
Status Timestamp
2024-03-19 02:23:13 PM +0000
Start Date
2024-03-15
Expiration Date
2026-03-15
Statement as Acknowledged
I agree to complete the Youth Protection Training course. I understand that I will not be able to participate in volunteer activities requiring this credential until I have completed the online course.

Audit Credential Dashboard

The Precollege Liaison is responsible for the overall integrity of volunteerism risk management policy and the implementation of that policy. Electronic tracking enables them to perform instant audits on the status of all volunteer credentials with a specific emphasis on organization-wide credential conflicts, and denied and exempted credentials. Audits can be performed as often as the Policy Auditor feels necessary.

Program Facilitator will monitor volunteer assignments – or credentials – for each event. Administrator will complete an audit weekly/monthly of credential conflicts to ensures integrity of the data and volunteer compliance.

Process

Review credential conflicts across all projects to assure they have been given the proper attention by Credential Administrators and Project Organizers.

1. Audit Denied Credentials

For assistance with understanding the Credential Status Reporting, see <u>https://support.volunteermatters.com/hc/en-us/articles/360011314074</u>.

2. Audit Exempt Credentials

All changes to an exempt status should be accompanied by notes explaining the reason for the exemption as well as a history record showing when and who made the change.

Review notes to assure policies for exemptions have been followed.

Exemptions due to the age of the applicant may be assigned automatically by the system (i.e., a volunteer was exempted by the system because they were too young or too old) and exemptions may be made manually by UW Shared Services with regards to a background check, etc... In some instances providing volunteers with an exemption may be used to 'work around' policy. It is important that we review exempt credentials and validate the exemptions were applied properly.

Most credentials should have an APPROVED status not EXEMPT. An Exempt status appears whenever Admin makes changes to a credential. For example, a CBC is approved, unless Admin reviews and makes a change, then the status is changed to Exempt.

3. Spot-Check Application of Risk Profiles to Volunteer Opportunities

When defining volunteer opportunities on their project (shifts, positions, items and tasks), Program Organizers must properly associate the required credentials. Review project needs to determine if the risk profiles have been applied properly. If they have not, contact the offending Program Organizer to alert them to the error so that they may a) correct all current/future assignments and b) review training materials and this guide for training on the policy and tools for implementation. We recommend running the cross-project Need Configuration report within VolunteerMatters (which include credentials associated with project needs), see https://www.volunteermatters.org/admin/projects/reports/need-configuration.

For assistance in discovering who the Program Organizer is within VolunteerMatters, see <u>https://support.volunteermatters.com/hc/en-us/articles/360011401113</u>.

For assistance on assigning credential requirements within VolunteerMatters, see https://support.volunteermatters.com/hc/en-us/articles/360011051014.

PROGRAM ORGANIZER FUNCTIONS

The Pre-College Liaison will create your project (program) for you in Volunteer Matters. The project created for you will not contain job roles, but instead it will serve as the project framework or "shell". The Pre-College Liaison will enter the Project Name, Publish Start Date, Publish End Date, and Address of the Project. The Pre-College Liaison will then assign the Project to you.

Note: in the interim, the Administrator will complete Program Organizer functions until UWGB establishes different protocols.

- Create a new volunteer project [Create a New Volunteer Project PDF]
- Assign to Program Organizer [Assign to Organizer PDF] and Add Organizer PDF]
- Add Project Needs (risk profile, credentials, items, shifts, tasks)
- Assign Positions / Send Invitations
- Monitor Credential Assignments
- Use Reporting Tools
- Complete Staff Roster
- Manage Contact Database

Login to Volunteer Matters

- 1. Open a web browser and navigate to <u>https://uw.volunteermatters.org/login.</u>
- 2. Select "Login for UW Employees and Students"



3. Select your Organization



4. Login using your UW Net ID credentials:

MAINES@uwgb	.edu
	Forgot password?

Definitions

Project Management: Program Organizers within the University of Wisconsin VolunteerMatters system are assigned to projects specific to their programs by the Precollege Liaisons. The program organizer can manage most aspects of the project and this document will go over those areas.

First, here are some basic definitions of the various elements in a VolunteerMatters project. For the most part you will not be dealing with most of this information, but having that background information is always helpful.

Volunteer Project: A project is any event, program or initiative around which you would like to organize volunteers. You must be an 'administrator' in order to create projects. Projects have a description (name, image, summary, goals, contacts, address, etc.), they have categories (areas of focus, intended beneficiaries, impact areas, etc.), they have rules for publishing the project in the Project Catalog, and they have Needs (the things people are actually signing up for – shifts, tasks, items, positions). 'Organizers' can edit, manage assignments to, and report on projects. However, an administrator must assign them to the project first.

General Volunteer Project: a project designated as the placeholder for general volunteers that are outside of youth activities. These volunteers only receive the General Volunteer Agreement. This project is always labeled by year: 2024 General Volunteers

Project Dashboard: Each project in VolunteerMatters includes a "Project Dashboard" to provide a high level view of project analytics and data for administrators and organizers.

Project Needs: There are four types of needs you can add to a project. You should add needs of at least one type but you may have multiple types of needs. Needs can be risk profiles, items, shifts or tasks..

Risk Profile / Positions: A position is a long-term commitment to take on a more staff-like role for the project or organization. An example might include a volunteer manager, project chair, or committee member. Volunteers would be committing to this position for a period that spans days, weeks, months, or even years. This is quite different from a "role" which describes a particular job relating to shift work. Many times, the work related to a position is unscheduled and therefore done on a volunteer's own time.

Items: Needs where you are asking volunteers to donate or lend item(s) to your cause (food, tools, clothing, etc.). You may define the total number of a particular item you need and the volunteer can specify how many they will bring. Items have a due date as to when you expect them to be delivered.

Shifts: Needs where a volunteer is expected to work a specific role (job) during a predetermined time slot (specific date and time). A project may have many different roles (e.g., greeter, helper, worker, cleaner) or you may have one role to which all people may be assigned.

Tasks: Needs where you are asking a volunteer to "do" something but the work can be done according to the volunteer's schedule. You are only asking the task be completed by a specified date.

Project Catalog: The project catalog is the central resource for volunteers to search, browse and sign-up for your volunteer project needs. When you advertise for prospective or registered volunteers to sign-up to help, you are asking them to visit the Project Catalog in order to find a need they would like to fulfill. The project catalog shows all projects that have current or future needs, whose publish start date is on or before today, whose publish end date is on or after today, and that is not hidden. You may specify the publish dates as well as a publish mode that determines which types of users should see the project in the catalog (public, volunteers, administrators, or hidden).

Assignments: Once someone signs-up for a need or they are appointed by an administrator they are "assigned" to that need. When we manage assignments this means we are managing those who are or will be assigned to a specific need on a project.

As of 2/07/2024

Create Volunteer Project

A Project should be created for every sponsored program where volunteers are necessary for program operation. Use the <u>Create a New Volunteer Project PDF</u> or the instructions below.

General Volunteers Outside of Youth Activities: UW-Green Bay creates an annual project to document general volunteer activities that are not related to youth activities. This project is labeled: *2024 General Volunteers*

- 1. Log into VolunteerMatters with the Project Administrator role.
- 2. Click "Projects" (Briefcase Icon) from the main menu.

	=	
Menu & Contacts & Credentials	Volunteer Dashboard	
 Projects My Profile 		
Project Catalog	PROJECTS & 18 VOLUNTEERS	

3. Scroll down and click the "New Project" button.

Projects	,	
Projects Reports -	Show 10 v entries Search:	
Published Ends After	Copy Excel CSV Print	
Show all projects with a Publish	Publish Project Ik Campus II Publish II Start II	
Clear this field to find projects with all publish end dates.	TEMPLATE: CAMPUS University of Wisconsin Hidden 2023-09-01 NAME: Volunteer Onboarding	Dashboard Needs
Select all that apply	Showing 1 to 1 of 1 entries	Previous 1 Next
Ø Apply Filter	New Project	

4. Leave all default settings except the following.

Section	Field	Details
Identification	Campus	Primary site project is associated with. Should
		always be your campus.
	Unique Name	Name for the Project/Camp
	Description	Good description of the camp that the volunteer will see.
	Project Image	Add an image to link to the project (for display)
	Publish Mode	Choose one. Only use "public" if wish to display to
		the public.
	Publish Start Date	
	Publish End Date	System recommends year as 2050
Extended Information	Generally leave default settings	
Settings	Send Automated Thank You	Toggle to deactivate; generally do not need to
		send a thank you email every time an assignment is completed
	Enable Volunteer Feedback	Toggle to deactivate
	Send Automated Assignment Reminders	Recommend leaving the default setting here.
	Email from Name	Update to the Project Organizer Name.
	Email Reply-To Address	Update to the Project Organizer Email Address

Section	Field	Details
Project Need Types	Exclude Items	Only toggle to deactivate if you will not be using
		these "Needs". However, it is fine to leave as is.
	Exclude Tasks	
	Exclude Positions	
	Exclude Shifts	

5. Click the "Save" button.

Example

Identification	
Campus	
UW-Eau Claire	v ~
The primary branch/site/location this project is asso the headquarters or organization site.	ciated with. If the project is not affiliated with a specific site, it is recommended to select
Unique Name	
UW-Eau Claire: Youth Camps	✓
Provide a unique name for this project.	
Description	
TBD	~
The description is intended to provide a summary of	f the project to volunteers.
Project Image IIPI Group Image Class	
Designate an image that reinforces the branding or	goals, or intended beneficiaries of the protect. An image can be uploaded to your protect
image library within your VolunteerMatters site.	gene, et mienene e energie e ale project fin mege een ee opreseere te frei project
Background Image URL	
Publish Mode	
Public	·
The Publish Mode defines which users will be able to volunteers to search, browse and sign-up for your v	o see this project in the Project Catalog. The Project Catalog is the central resource for olunteer project needs.
Publish Start Date	
	<u>ا</u> ر
2023-09-01	· .
2023-09-01 The date the project should start appearing in the p	roject catalog.
2023-09-01 The date the project should start appearing in the p Publish End Date	roject catalog.
2023-09-01 The date the project should start appearing in the p Publish End Date 2024-09-01	roject catalog.
2023-09-01 The data the project should start appearing in the p Publish End Date 2024-09-01	roject catalog.
2023-09-01 The date the project should start appearing in the p Publish End Date 2024-09-01 Email From Name Override the system from r	roject catalog.
2023-09-01 The date the project should start appearing in the p Publish End Date 2024-09-01 Email From Name Override the system from r	roject catalog.
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2023-09-01 The date the project should start appearing in the p Publish End Date 2024-09-01 Email From Name Override the system from r Email Reply-To Address Override the system reply- Project Need Types You may exclude specific types of needs from this p have already been assigned has complicated side eff	roject catalog.
2023-09-01 The date the project should start appearing in the p Publish End Date 2024-09-01 Email From Name Override the system from r Email Reply-To Address Override the system reply- Project Need Types You may exclude specific types of needs from this p have already been assigned has complicated side of Exclude Items	roject catalog.
2023-09-01 The date the project should start appearing in the p Publish End Date 2024-09-01 Email From Name Override the system from r Email Reply-To Address Override the system reply- Project Need Types You may exclude specific types of needs from this p have already been assigned has complicated side ef Exclude Items Select if Items will not be used for this project	roject catalog.
2023-09-01 The date the project should start appearing in the p Publish End Date 2024-09-01 Email From Name Override the system from r Email Reply-To Address Override the system reply- Project Need Types You may exclude specific types of needs from this p have already been assigned has complicated side ef Exclude Items Select if Items will not be used for this project Exclude Tasks	roject catalog.
2023-09-01 The date the project should start appearing in the p Publish End Date 2024-09-01 Email From Name Override the system from r Email Reply-To Address Override the system reply- Project Need Types You may exclude specific types of needs from this p have already been assigned has complicated side ef Exclude Items Select if Items will not be used for this project Exclude Tasks Select if Tasks will not be used for this project	roject catalog.
2023-09-01 The date the project should start appearing in the p Publish End Date 2024-09-01 Email From Name Override the system from r Email Reply-To Address Override the system reply- Project Need Types You may exclude specific types of needs from this p have already been assigned has complicated side ef Exclude Items Select If Items will not be used for this project Exclude Tasks Select If Tasks will not be used for this project Exclude Positions	roject catalog.
2023-09-01 The date the project should start appearing in the p Publish End Date 2024-09-01 Email From Name Override the system from r Email Reply-To Address Override the system reply- Project Need Types You may exclude specific types of needs from this p have already been assigned has complicated side of Exclude Items Select if Items will not be used for this project Exclude Positions Select if Positions will not be used for this project	roject catalog. roject catalog.
2023-09-01 The date the project should start appearing in the p Publish End Date 2024-09-01 Email From Name Override the system from r Email Reply-To Address Override the system reply- Project Need Types You may exclude specific types of needs from this p have already been assigned has complicated side of Exclude Items Select if Items will not be used for this project Exclude Positions Select if Positions will not be used for this project Exclude Shifts	roject catalog.

Assign Project Organizer

A Project should be created for every sponsored program where volunteers are necessary for program operation. An individual must be assigned by Shared Services as an Organizer, otherwise they cannot be listed.

Use the Assign to Organizer PDF or use the instructions below.

If your Program Organizer has never logged-in to the VolunteerMatters portal in the past, please ask them to first visit <u>https://uw.volunteermatters.org</u> and login with their UW Net ID. This will automatically create a user in the VolunteerMatters portal that will then be available to the UW Shared Services team to add the Organizer security role and the proper Contact Segment/Branch Restriction to. After they login, please contact UW Shared Services to add the proper rights.

- 1. Log into VolunteerMatters with the Project Administrator role.
- 2. Click "Projects" (Briefcase Icon) from the main menu.



3. Locate the Project you wish to assign the Organizer to and click the "Dashboard" button.

Projects		Ę.	
Projects Reports -			
Filter Projects	Show 10 v entries	Search:	
Published Ends After	Copy Excel CSV Print		
2023-11-10		Publish	
Show all projects with a Publish	Project 🅼 Campus 👫 Pu	iblish 🕴 Start 🛛 👫	
Clear this field to find projects with all publish end dates.	 TEMPLATE: CAMPUS University of Wisconsin Hic NAME: Volunteer Onboarding 	dden 2023-09-01	Dashboard Needs
Select all that apply	UW-Stout: Youth UW-Stout Put Camps	blic 2023-09-01	Dashboard Needs
C Apply Filter	Showing 1 to 2 of 2 entries		Previous 1 Next
	⊕ New Project		

4. This will open the "Project Dashboard" page. Click the "Manage" drop-down button and select "Project Setup".

Proje	ct Dashboaı	rd UW-Sto	ut: Youth Camps			1
Dashboard	Manage - Reports -					
🗀 UW-Stout	Project Setup		Project Staffir	ng (Next 30 D	ays)	
TBD	Project Invitation	Ω.		Under >	Minimally >	Fully >
			Desthisses			

5. Once on the "Project Setup" page, you will see the "Project Organizers" section (typically on the right column - depends on your browser width). Click in the "Choose Project Organizers" section and then select

the organizer(s) desired. NOTE: You can start to type in the field to filter the organizer results in the dropdown. The list will include anyone with the Organizer role on their record. Even as a Project Administrator you may want to be added to a Project as an Organizer for <u>notification purposes</u>.

Show 10	∽ ent	riesSearch:			
Сору Е	xcel CS	/ Print			
Organizer			J1		
Ν	lo data ava	ilable in ta	ble		
Showing 0	to <mark>0 of 0</mark> er	ntrie Previ	ous	Next	
Showing 0	to 0 of 0 er	ntrie Previ	ous	Next	
Showing 0 Choose Proj	to 0 of 0 er ect Organ	izers	ous	Next	
Showing 0 Choose Proj	to 0 of 0 er ect Organ	izers	ous	Next	
Showing 0 f Choose Proj	to 0 of 0 er ect Organ	izers	ous	Next	
Showing 0 f Choose Proj Johnson, Dale Nawyn, Kim	to 0 of 0 er ect Organ	izers	ous	Next	
Showing 0 f Choose Proj Johnson, Dale Nawyn, Kim Clifton, Prenic	to 0 of 0 er ect Organ	izers	ous	Next	
Showing 0 f Choose Proj Johnson, Dale Nawyn, Kim Clifton, Prenic Acardo, John	to 0 of 0 er ect Organ	izers	ous	Next	
Showing 0 f Choose Proj Johnson, Dale Nawyn, Kim Clifton, Prenic Acardo, John Schwartz, Roi	to 0 of 0 er ect Organ e tia	izers	ous	Next	
Showing 0 f Choose Proj Johnson, Dale Nawyn, Kim Clifton, Prenic Acardo, John Schwartz, Roi CURRAN, MIC	to 0 of 0 er ect Organ e tia nald iHELE	izers	ous	Next	
Showing 0 f Choose Proj Johnson, Dale Nawyn, Kim Clifton, Prenic Acardo, John Schwartz, Roi CURRAN, MIC Docken, Lorie	to 0 of 0 er ect Organ cla nald HELE	izers	ous	Next	

6. Then click "Add Organizers".

Project Organizers
Show 10 ~ entriesSearch:
Copy Excel CSV Print
Organizer 1
No data available in table
Showing 0 to 0 of 0 entrie Previous Next
Choose Project Organizers
Nawyn, Kim 🗙
Add Organizers

This will make that contact an organizer on the project the next time they log in. They will need to log out and back in if they were previously logged in.

6. Notify Program Director when project is available.

Assign Organizer to an existing Project

- 1. Log into VolunteerMatters with the Project Administrator role.
- 2. Click "Projects" (Briefcase Icon) from the main menu.



3. Locate the Project you wish to assign the Organizer to and click the "Dashboard" button.

Projects		Ę.	
Projects Reports - Filter Projects	Show 10 v entries	Search:	
Published Ends After 2023-11-10	Copy Excel CSV Print Project Ik Campus II Pr	Publish ublish 11 Start 11	
Clear this field to find projects with all publish end dates.	TEMPLATE: CAMPUS University of Wisconsin Hi NAME: Volunteer Onboarding	idden 2023-09-01	Dashboard Needs
Select all that apply •	UW-Stout: Youth UW-Stout Pu Camps Showing 1 to 2 of 2 entries ONew Project	ublic 2023-09-01	Dashboard Needs Previous 1 Next

4. This will open the "Project Dashboard" page. Click the "Manage" drop-down button and select "Project Setup".



5. Once on the "Project Setup" page, you will see the "Project Organizers" section (typically on the right column - depends on your browser width). Click in the "Choose Project Organizers" section and then select the organizer(s) desired. NOTE: You can start to type in the field to filter the organizer results in the drop-down. The list will include anyone with the Organizer role on their record. Even as a Project Administrator you may want to be added to a Project as an Organizer for notification purposes.

Project Org	anizers					
Show	.0 🗸	entrie	sSearch:			
Сору	Excel	CSV	Print			
Organiz	er					
	No dat	a ava <mark>il</mark> a	ble in ta	ble		
Showing	0 to 0 o	f 0 entri	e Previ	ous	Next	
Choose Pr	oject O	rganize	ers			
			/			
Johnson, D	ale					1
Nawyn, Kir	n					
Clifton, Pre	nicia					

6. Then click "Add Organizers".

Project Or	ganizers				
Show	10 ~	entrie	sSearch:		
Сору	Excel	CSV	Print		
Organi	zer				
	No dat	a availa	ble in ta	ble	
Showing	0 to 0 o	f 0 entr	ie Prev	ious	Next
Choose P	roject O	rganize	ers		
Nawyn,	Kim ×				
Add Organ	izers	-	_		

This will make that contact an organizer on the project the next time they log in. They will need to log out and back in if they were previously logged in.

Add Project Needs - Positions

Project needs include position/roles, credentials, or items, essentially what the program needs for the camp to operationally run.

Risk Profile/Position Roles

VolunteerMatters includes risk profiles – or positions. Essentially, a risk profile is considered a project position. Targeted positions, such as Health Camp Supervisor, need to be added to each project.

If there is a unique position to the program that also has a specific credential required, e.g. Archery requires an Archery Certification, you will need to create the credential before completing this section.

1. Click "Projects" (Briefcase Icon) from the main menu.

	=	
Menu & Contacts Projects Wy Profile	Volunteer Dashboard	

2. Click the "Needs" button to the right of the project you wish to add a position to.

Projects Reports -			
Filter Projects	Show 10 v entries	Search:	
Published Ends After	Copy Excel CSV Print		
2023-11-08		Publish Publish	
Show all projects with a Publish	Project	11 Publish 11 Start 11 End 11	11
Clear this field to find projects with all publish end dates.	UW Stout: University of Wisco Volunteer	insin Public 2023-10-25 2030-10-25 Dashbox	ard Needs

3. Under the Project Positions box, click the "+add position": button.

Dates	↓ Name	11 Staffed	1 Required	
		N	o data available in table	
Showing 0 to 0	0 of 0 entries			
+ add position				

This will open the Project Position Need configuration page.

4. Add the position information in the following fields:

Name	Enter the risk profile or position (see list below)					
Description	List the description for this profile/position.					
Default Credited Hours	The number of hours that the position will automatically be credited to the volunteer once they sign					
	up for the position.					
Minimum Required	The minimum number of available slots on the position. This is only informational for staffing.					
Maximum Required	The maximum number of available slots on the position. Once this number is hit, the position will no					
	longer be available for signup from a volunteer's perspective.					
Start Date	List the start date of the project/program.					
End Date	List the end date of the project/program.					
Minimum Age	Specify a minim age (in years) to sign-u and work this position. Must always be at least 2 years older					
	than the participant age.					
Required Credentials	For each position, you may specify one or more credentials that may be required for this position. Click					
	on each credential listed that is required for the position. Refer to Reference Section Volunteer					
	Training.					
	For example, one position may require a background check or a medical certification.					

Position Descriptions

Credentials are set up in Volunteer Matters as follows:

Training Credentials	Completed	Volunteer	Youth Camp Staff/Volunteers					
	Via		Camp	Health	Camp	Limited		
			Director	Supervisor	Staff/Volunteer	Volunteer		
CBC	HireRite	If POT	Х	Х	Х			
CPR Certificate	Upload		Optional	Х				
Driver Authorization			Optional	Optional	Optional	Optional		
Medication Management DPI	Upload		Optional	Х				
Youth Protection Videos (3)			Х	Х	Х			
Camp Operations Manual	Check Box		Х	Х	Х			
Youth Event Agreement	Check Box		Х	Х	Х			
Youth Event Agreement Minor	Upload				Х			
Youth Agreement Limited	Check Box					Х		
Volunteer Agreement	Check Box	Х						

Position	Description	Suggested Credentials
Health Supervisor	Individual responsible for routine and emergency health care supervision, such as first aid triage, medication management and emergency medical response. This individual must have at a minimum a CPR certification from the American Red Cross. This individual may also be in charge of other Health Staff.	 CPR Certification Attachment Medication Management Youth Agreement CBC Operations Manual Mandated Reporter Preventive Sexual Harassment Youth Protection
Camp Director	Individual responsible for the operation of the program, staff supervision, food and health services, and other supportive services. Must be at least 21 years of age with two or more years of supervisor or administrative experience in an organized camp or children's program.	 Youth Agreement CBC Operations Manual Mandated Reporter
Camp Staff (Paid Position)	Responsible for interacting with program participants, complete operational tasks and see to participant safety. Follows operational guidelines including but not limited to participant check in/check out, safety, and reporting incidents. Must be 2 years older than participants in the program and may be asked to complete CPR Certification. May be assigned as a Designated Adult who is counted in the supervision ratio.	 Preventive Sexual Harassment Youth Protection
	campus while program is in operation and have oversight of participants and the housing area where participants reside.	
Camp Volunteer	Responsible for interacting with program participants, complete operational tasks and see to participant safety. Follows operational guidelines including but not limited to participant check in/check out, safety, and reporting incidents. Must be 2 years older than participants in the program and may be asked to complete CPR Certification. May be assigned as a Designated Adult who is counted in the supervision ratio.	
	Overnight Position Description Includes: Individual will sleep overnight at the campus while program is in operation and have oversight of participants and the housing area where participants reside.	
Camp Volunteer Minor	Responsible for interacting with program participants, complete operational tasks and see to participant safety. Follows operational guidelines including but not limited to participant check in/check out, safety, and reporting incidents. Must be 2 years older than participants in the program. Minors cannot supervise minors, even if 2 years older than the youth participant. Therefore a minor camp staff is limited functionality.	 Youth Agreement Potential CBC Volunteers under age of 18 will require parent/guardian signature on the Youth Agreement.
General Volunteer	An individual at a covered activity who has no direct interaction with participants for a limited and defined time (such as a one-time-only basis or a scheduled presentation series) who is never left alone with youth participants and does not	 Youth Agreement Limited

share personal contact information with youth participants. e.g., Guest Speakers, Referees, Private Family Aids, Registration Booth or Camp Errands.		
Individual assigned an activity or role outside of youth activities. See Reference – General Volunteer Processing Section. E.g. individual working with CSET during the summer at Lower Fox River. Sponsor will need to verify with HR if employee is in a Position of Trust with the volunteer role. A POT requires a CBC.	•	Volunteer Agreement Potential CBC

Basic Positions

These are positions identified by UW System not currently used by UWGB but available to use.

Position	Description
Authorized Adult	Individuals, age 18 and older, paid or unpaid, who are authorized to interact with youth participants as part of a covered activity. Authorized adults cannot have unsupervised access to minors.
Designated Individual	An authorized adult who is counted in the supervision ratio for a covered activity. Designated individuals are responsible for ensuring the care and safety of youth participants in covered activities.

5. When you are satisfied with your changes, click the "Save" button.



6. This will return you to the "Project Needs" page.

🖆 Project Positions							
Past Current							
Show 10 🗸 entries						Search:	
Copy Excel CSV Print							
Dates	🕼 Name	Staffed	Required	Assigned			
Mar 01, 2024 - Mar 02, 2024	Health Supervisor	Under	1	0	As	ssign Edit	Delete

7. Complete Steps 1-4 for each position to the project.

You may assign volunteers at this time using the ASSIGN button. Otherwise, refer to Assign Project Volunteer section.

Add Shifts, Tasks, Items

From the Projects Configuration Page, open a specific Project, select Needs and scroll to the identified need you wish to update/add: Shifts, Tasks, Items.

1. Click "Projects" (Briefcase Icon) from the main menu.



2. Click the "Needs" button to the right of the project you wish to add a position to.

Projects Reports -				
Filter Projects	*	Show 10 ~ entries	Search:	
Published Ends After		Copy Excel CSV Print		
2023-11-08	=	Publish	n Publish	
Show all projects with a Public End Date after the above value	sh ie.	Project 🎼 Campus 👫 Publish 👫 Start		
Clear this field to find projects all publish end dates.	s with	UW Stout: University of Wisconsin Public 2023-10 Volunteer Onbearding	0-25 2030-10-25 Dashboard Needs	

3. Under the Project Shift box, click the "+add shift": button.

Dashboar	d M	anage 🗸	Rep	orts 🕶			
🕓 Proje	ct Shifts	;					
< Su	Мо	Febru Tu	iary 202 We	4 Th	Fr	> Sa	Show 10 v entries
28 4	29 5	30 6	31 7	1 8	2	3 10	Copy Excel CSV Print
11	12	13	14	15	16	17	Date II Day I Time I Name I Staffed I Required I Assigned
18 25	19 26	20	21	22	23	24 2	No data available in table
3	4	5	6	7	8	9	Showing 0 to 0 of 0 entries
			clear				 ★ add shifts Ø shift roles Ø Bulk Edit Ø Bulk Assign ▼
	1						
Past Show	Ct Tasks	rent ✓ ent	ries				
Сору	Exce	el CS	V Prin	t			
Due			.l≞ Na	ame			Staffed Assigned Completed

This will open the configuration page to add the specific need required.

Assign Project Volunteer

This section refers to assigning specific individuals to project positions. Once your project needs are set, you may assign specific volunteers to a position. Other options may include allowing the public to self-assign to a volunteer position. However, you may have specific individuals in mind for positions.

This step is often triggered by receipt of a temporary employee offer letter that Administrator is copied on.

Assigning a volunteer does not automatically send them an invitation or email. You must complete this task separately; see *Invite/Notify Volunteers*.

- Select Projects from main screen
- Scroll to Project and select Needs

• Test Camp 2024 #1	Public	2024-02-14	2024-02-23	2024-02-06	Dashboard	Needs

- Scroll to Project Positions
- Select ASSIGN to the corresponding position you wish to assign a volunteer to

Name	1 Staffed	Required	Assigned	11	
Camp Director	Fully	1	1	Assign	Edit
Health Supervisor	Fully	1	1	Assign	Edit

Enter Volunteer information

Contact Detail Schevers, Patti
Edit Send a Note
Basic Information
Name
Patti Schevers
Birth Date
Email
scheverp@uwgb.edu
Contact Since
2024-02-06
Campus
UW-Green Bay

If volunteer is not currently listed within the Contact Database, you will have to exit and create a contact profile before this step.

Save. You may always return and edit details or volunteer as needed. Se

Complete steps above for each volunteer. Refer to *Invite Project Volunteer* section to invite/notify volunteer of assignment..

Invite Project Volunteer

Once your project needs are set, and positions have been assigned, you may invite volunteers to register under your project. This invitation should include instructions on the proper onboarding position to register. Otherwise, once the project is published, members of the public seeking a volunteer opportunity may also apply.

Do not use the Project Needs function to send an email to a volunteer, it will not show up in the volunteer email box.

You may send notice to the volunteer using either the EMAIL or VM INVITATION process below. It is recommended to send an invite through UWGB Outlook instead of Volunteer Matters invitation process. The invitation process takes additional time. You may consider skipping the invitation step if the volunteer has already been notified through the Camp Office Staff Letter that includes a link and instructions to the VolunteerMatters site.

Email

- 1. Open up Project
- 2. Select Project Needs
- 3. Select Project Position
- 4. Select ASSIGN of a specific position

Dates	1 Name	1 Staffed 1 Require	ed 🕴 Assigned	1.1†
Apr 30, 2024 - Dec 31, 2024	Camp Director	Minimally 1 - 10	4	Assign
Apr 30, 2024 - Dec 31, 2024	Health Supervisor	Minimally 1 - 10	3	Assign
Apr 30, 2024 - Dec 31, 2024	Staff Volunteer	Minimally 1 - 10	2	Assign
May 20, 2024 - Dec 31, 2024	Residential Hall Volunteer	Minimally 1 - 40	18	Assign

- 5. Select Excel and download
- 6. Copy the volunteers emails into Outlook Email
- 7. Send the following message

Thank you for volunteering for the youth activities at UWGB. UGWB uses the VolunteerMatters platform to ensure our volunteers complete the required youth protection training.

We would ask that you visit the VolunteerMatters link to register and complete the training that is assigned to you.

1. Create a Login

External UWGB	UWGB User
Select REGISTER NOW (at bottom) Need an account? Register Now Enter email and CLICK HERE	 Select LOGIN for UW Employees and Students Use your assigned UW NET ID username/password
Create Your Login Information Email Please provide the email address you wish to associate with your account. We have a volunteer record on file for that email address. If this is your email, please click here. Use the email account that you received instructions from. Do not use a different email as this will create a NEW PROFILE and you will not see your assigned training If you use a different email account, notify maines@uwgb.edu as this will change your view.	Do not create a new profile Login for UW Employees and Students Need an account? Register Now Once complete, your dashboard will reflect trainings assigned to you

We already have a record in our database associated with your registration to continue your registration of the set of th		
Create your username and passwo And add basic profile information a	rd ind CONTINUE	
Create Your Login Information Email		
Please provide the email address you wish to associate with your account. Username		
Please enter your desired username. Password		

2. Criminal Background Check: You will receive an additional email from HireRite that you MUST accept to initiate the CBC that may be assigned to you.

Deadline: June 22

If you have any questions or need more information about the volunteer registration process, please don't hesitate to reach out to me at 920-465-2781 or maines@uwgb.edu.

Your involvement and commitment are highly appreciated, and we look forward to working with you.

Once the volunteer opens the Volunteer Matters link and initiates the CBC Credential, a link will go to HireRite. HireRite will then send an invitation email link to the Volunteer. The volunteer MUST select this email link as well to start the CBC process.

VM Invitation

For documentation purposes, below is the VM invitation process within Volunteer Matters. We do not use this process and elect to send an email using outlook not the VM System.

1. Open Project Dashboard

- Select Projects from main screen.
- Scroll to Project and select Dashboard

-						
• Test Camp 2024 #1	Public	2024-02-14	2024-02-23	2024-02-06	Dashboard	Needs

2. Select Manage / Project Invitation



4. Complete Invite Volunteers email details that will go to recipients.

Choose Volunteers	 Click on "Choo You can use the 	 Click on "Choose Volunteers" to open the <u>contact chooser</u> to select contacts already in the s You can use the contact chooser to select any number of volunteers. 				
	Volunteer I Choose Volur	Recipients teers	nem as Additional Email Reci	<i>pients</i> . Otherwise, go		
	 to Contacts ar Select the Volu Choose Contact 	nd set up the volunteer before co unteers for this project by clickin ^{tt(s)}	ompleting this section. g in the blank box next to vo	lunteers name.		
	Schevers, Patti;	Schultz, Abby; Volunteer, Student; Maine-Dele	epierre, Sandi			
	View All Contacts	v C 25 v Quick	find O Q			
	4 total record(s) found	I. Name	Campus	Email		
	1	Maine-Delepierre, Sandi	UW-Green Bay	maines@uwgb.edu		
	2	Schevers, Patti	UW-Green Bay	scheverp@uwgb.edu		
	3 🗹	Schultz, Abby	UW-Green Bay	schultza@uwgb.edu		
	4 🗹	Volunteer, Student	UW-Green Bay	stcamps@uwgb.edu		
	If you "check a list, not on all were set to 25 on the 500 rec Then click the	all" or "clear all" while in the cho of the records that may have re 5, it would act on the 25 records cords displayed. The "Items" sett "Choose" button to return to the	oser, it will only act on the re sulted from a search. For ex displayed. If "Items" were s ing is at the top-middle of th e Project Invitation page whe	ecords viewable in the ample, if your "Items" et to 500, it would act e chooser. ere they will be added		

	Close Choose						
Additional Email Recipients	Contacts not in the system . Add emails of individuals not in the contact database. Enter a list of comma-separated email addresses for any potential volunteers not already in your VolunteerMatters system.						
	Additional Email Recipients						
	Use commas to separate a list of email addresses						
	pionteks@uwgb.edu, vaneremt@uwgb.edu						
Subject	You can use the default line of "We need your help!". Otherwise, create a specific subject line that includes the camp date. The Camp Name and Date is important for the volunteer to know the camp and date information.						
	Subject						
	Volunteer Project Invitation - March 30, 2024 Einstein Camp						
	Enter the subject for the email. Leave this blank to use the default.						
	This will update the "Project Invitation Email Preview" on the right with your custom subject.						
Special Invitation Message	You can use the default Project Invitation message or craft one of your own. Any Special Invitation Message is ADDED to the Default Message. Otherwise the default messaging will appear when you hit SEND.						
	Default Message						
	Project Invitation Email Preview						
	Subject: We need your help!						
	Dear Sandra, By volunteering through <u>Universities of Wisconsin</u> , you'll improve our community, make new friends, and feel the satisfaction of knowing that you've made a real impact.						
	Here is an upcoming fun and rewarding volunteer project.						
	Project Description: This is a test camp for UWGB to test the VM System. Learn More						
	Sincerely, Universities of Wisconsin						
	Special Invitation Message						
	Thank you for volunteering for the Einstein Project Camp this summer. UGWB uses the VolunteerMatters platform to ensure our volunteers complete the required youth protection training.						
	We would ask that you visit the project page link below to update your profile in the system and complete the required training that is assigned to you.						
	Click the "Login" button on the Volunteer Sign-Up page and then the "Login via UW Net ID" button to login and then complete the required onboarding credentials for your instructed volunteer role.						
	Criminal Background Check: You will receive an additional email from HireRite that you MUST accept to initiate the CBC that may be assigned to you.						
	Deadline: May 31						

As of 2/07/2024

If you have any questions or need more information about the volunteer registration process, please don't hesitate to reach out to us at (CONTACT EMAIL) or (CONTACT PHONE NUMBER). Your involvement and commitment are highly appreciated, and we look forward to working with you.

5. Check Box to Send Me Email Results

Click the box to send yourself the email results. Unselect the box if you do not wish to view the results. It is checked by default so it is only necessary to worry about if you do **not** want the results.

The email results will include those emails that were queued for delivery along with those who we were unable to send the invitation to.



6. Update Preview

Select the Update Preview if you wish to view what the message will look like.

Volunteer Recipients Choose Volunteers	Project Invitation Email Preview
Cook, Kelly; Clifton, Prenicia	Subject: We would love for you to register as a UW Stout Volunteer!
Additional Email Recipients	Dear <u>Glen</u> ,
Use commas to separate a list of email advresses	By volunteering through University of Wisconsin, you'll improve our community, make new friends, and feel the satisfaction of knowing
jane.smith@uw.edu; john.smith@uw.edu	that you've made a real impact.
li li	Here is an upcoming fun and rewarding volunteer project.
Subject	Volunteer Project: UW Stout: Volunteer Onboarding
We would love for you to register as a UW Stout Volunteer!	Project Description: We are thrilled to have you join our team of
Enter the subject for the email. Leave this blank to use the default.	community. Your participation is invaluable to us, and we are exc

7. Select UPDATE PREVIEW to include any Special Invitation to the Default Message

8. Select Send

Click on SEND once your message is complete and you are satisfied with the results.



Refer to next section to Create a Special Message Template

Monitor Volunteer Assignment Status

Once project is set up and volunteer invitations sent, the Program Director will need to manage the volunteer credential assignments – or their assigned screening and training process to ensure the volunteer has completed all the requirements prior to a covered activity date.

View Credentials Dashboard Contents

The Dashboard will inform you of the number of volunteers within a status, such as Review, which requires action on the part of the Program Facilitator.

Refer also to <u>Understanding Credential Statuses PDF</u> or the <u>Credential Conflicts List PDF</u> for additional information.

From Home Page select Credentials to open the Dashboard (left side of screen)



View Credentials Dashboard

The Dashboard will bucket assignments into



Credential Status Change Counts (Past 30 Days)

	Incomplete	Submitted	Review	Annroved	Exempt	Expired	Denied	Canceled
	incomplete	Sabinittea	Review	Approved	Exempt	Expired	Demed	cuncered
(UW-Green Bay) UWGB Youth Agreement	0	0	0	1	0	0	0	0
(UW-Madison) WPR Outreach Volunteer Corps Position Description	0	0	0	3	0	0	0	0
(UW-Madison) WPR Volunteer Agreement Letter	0	0	0	3	0	0	0	0
Volunteer Agreement	0	0	0	1	0	0	0	0
Criminal Background Check	0	2	0	2	5	1	0	0
(UW-Green Bay) UWGB Volunteer Agreement	0	0	0	14	0	0	0	0
Mandated Reporter Training	1	0	0	0	0	0	0	0
Preventing Sexual Harassment and Violence Training	1	0	0	0	0	0	0	0
Youth Protection Training	1	0	0	0	0	0	0	0
UW-Extension Driver Authorization	0	0	0	1	0	0	0	0

Most credentials should have an APPROVED status not EXEMPT. An Exempt status appears whenever Admin makes changes to a credential. For example, a CBC is approved, unless Admin reviews and makes a change, then the status is changed to Exempt.

Update Review Action Statuses

From the Dashboard, the Review and Denied status are the most important and require action.

- Click on number under REVIEW to Open
- Select on each volunteer and review the status

Credential Status Change Counts (Past 30 Days)						
	Incomplete	Submitted	Review	Approved	Exempt	
(UW-Green Bay) UWGB Youth Agreement	0	19	0	5	0	
(UW- Superior) Attestation	0	0	0	0	0	
Volunteer Agreement	0	0	0	5	0	
Criminal Background Check	0	2	1	16	10	

Change status as appropriate; see also *Change Credential Status* section

CPR Certifications: must be from American Red Cross or American Heart Association only. Medication Management should have 5 attachments (unless volunteer included them together)

Supporting Documents	
Timestamp	Original Filename
2024-02-29 20:19:51.0	Medication Topical 02292024.pdf
2024-02-29 20:19:51.0	Meidcation Eye 02292024.pdf
2024-02-29 20:19:51.0	Medication Ear 02292024.pdf
2024-02-29 20:19:51.0	Medicaton Oral 02292024.pdf
2024-02-29 20:19:51.0	Medication Principles 02292024.pdf

Dashboard Status Options

Credential Conflicts

Clic	k on (Credentia	ial Con	s. flicts at top	o of das	hboard	ł				
D	ashbo	oard V	/olunte	er Creden <mark>t</mark> ia	ls Cr	edentia	l Conflict	s			
Rev	iew s	creen or	r select	t EXCEL to e	export						
Filt€	er fro	m within	n excel	and copy e	email ir	nto Out	look to	send a re	min	der	
Сору	Excel	CSV	Print	Email							
Need											
Charles	1.00										
Start	11.1	Veed	.l† Pr	oject				Campus	Jt -	Assignee	
Start 2024	- (Need Camp Staff	JI Pr	oject g 20-23 Explo	oring Nat	ural Worl	lî Id of	Campus	.lt	Assignee Baughman,	
Start 2024 08-20	- c	Need Camp Staff	f Au On	oject g 20-23 Explo eida, 8:00-3:	oring Nat 00 pm, 4	ural Worl Ith-6th G	Lî Id of Grade	Campus UW-Green Bay	lt -	Assignee Baughman, Sarah	
 3024 08-20 2024 2024 	- (Need Camp Staff Camp Staff	f Au On	oject g 20-23 Explo eida, 8:00-3: g 20-23 Explo	oring Nat 00 pm, 4 oring Nat	ural Worl Ith-6th G ural Worl	Lt Id of Grade	Campus UW-Green Bay UW-Green	11	Assignee Baughman, Sarah Baughman,	

Credential Status Counts

L		
L	Lice to view a considered option	agenticate qual as CDD CEDTIFICATIONS
L	USE TO VIEW A SDECITIC CREDENTIAL	CONTICIS, SUCH AS UPK UPK ITEIUATIONS.

	Incomplete	Submitted	Review
(UW-Green Bay) UWGB Volunteer Agreement	0	0	0
(UW-Green Bay) UWGB Youth Agreement	0	0	0
(UW-Green Bay) UWGB Youth Volunteer Agreement-Minor Staff	0	0	0
(UW-Superior) Attestation	0	0	0
Volunteer Agreement	0	0	0
Criminal Background Check	0	9	2

Select EXCEL to import, use filters and obtain emails for Outlook reminders

C	ору	Excel	0	CSV	Pri	nt Email					
Co	ontac	:t		Age		Credential Name		Status		Status Timestamp	
•	Beta Sam	incur,		36		(UW-Green E CPR Certifica	Bay) Ition	Incomple	te	2024-04-10 20:35:53.0	

Project (Camp) Credential Status

Use when Program Facilitator wants to see their camp volunteers only. You can also use Credential Conflicts (above), export to excel and filter on a specific camp.

- Select Projects from main menu at left
- Search on Projects
- Click on Project Name to open
- Select Credential Conflicts from right of Dashboard

Need Type	Need	
Position	Limited Volunteer	
Position	Camp Volunteer	
Position	Health Supervisor	
Cradontial Co.		
elect Cr elect EX	redential Cont (CEL to impor	flicts (will only pull up the specific project conflicts) t, use filters and obtain emails for Outlook reminders

Submit Reminder Notifications

Reminder notifications should be sent routinely (weekly) to staff who have not finalized their screening or training. Any staff or volunteers not finalized the day prior to a camp program will be further notified they are not allowed to participate.

- Select Credentials Conflicts
- Select Excel



- Open download report (upper right corner)
- Sort by Camp and Staff Last Name
- Email volunteers by Camp and cc Camp Director

In the event staff/volunteer have NOT completed screening and training prior to first day of camp program, someone must escort staff off the premises. They may return upon completion of all assigned credentials.

Understand Status Descriptions

You will need to have a clear understanding of credential status before you review any credential status or conflicts.

Status	Description	Additional Actions Needed
Approved	Some credentials are set up to be automatically approved upon completion, i.e. electronically signed agreements like the Volunteer Agreement.	Volunteer can proceed with any activity. May automatically change from this status if there is an expiration policy.
Cancelled	An administrator outside service marked the credential canceled manually.	Occasionally when an integrated credential is run, there can be an error where the credential results in a "Review" status. The credential details typically will have the reason for failure. Most of the time the credential process simply needs to be run again. After editing the credential status, the precollege liaison will either contact the volunteer or have the program organizer contact the volunteer to to explain the problem with their previous submission and what they must submit to correct the application. Upon login to the portal (<u>https://uw.volunteermatters.org</u>), the volunteer will be prompted to start the canceled credential application again.
Denied	A Credential Administrator or an integrated 3rd party provider has explicitly denied the application for this credential. This excludes the volunteer from participating in any volunteer opportunity that requires this credential	Contact the Program Organizer assigned to this project and have them remove the volunteer from the assignment and notify the volunteer of their ineligibility. The Administrator and/or Program Organizer should have immediately removed the assignment and contacted the volunteer to notify them of their ineligibility.
Exempt	The credential is automatically exempted for the volunteer when they fall below the "Age Exemption Limit" setting on the credential. This is similar to being approved and the volunteer can proceed with the project assignment without issue.	All changes to an exempt status should be accompanied by notes explaining the reason for the exemption as well as a history record showing when and who made the change.
	The volunteer was not approved but instead is exempt from the requirement. Exemptions due to the age of the applicant may be assigned automatically by the system (i.e., a volunteer was exempted by the system because they were too young or too you	Review notes to assure policies for exemptions have been followed
	exemptions may be made manually by UW Shared Services with regards to a background check, etc	
Expired	The credential was either automatically expired by rule or by manually by an administrator.	The volunteer will need to re-complete the credential once they are assigned the credential again for a new covered activity.
Incomplete	Something additional is required of the volunteer. This status indicates you are waiting update from the volunteer - whether they have not completed the integrated background check or training, or have yet to upload a needed file, or the organization reviewed and decided the application was incomplete or incorrect and kicked it back to the volunteer.	When editing the credential status, set the "Waiting for File Upload" setting to True. Also enter notes describing the reason for the incompletion. Contact the volunteer to explain the problem with their previous submission or have the program organizer follow up with the volunteer and explain what they must submit to correct the application. Upon login to the portal (<u>https://uw.volunteermatters.org</u>), the credential banner will display on the volunteer dashboard/homepage and the volunteer can click on "Complete Application" to resolve incomplete credentials.
Missing	The volunteer has either never applied for the credential, their previous application was incomplete, or the credential has expired and the application must be repeated. The volunteer has either never applied for the credential, their previous application was incomplete, or the credential has expired and the application must be repeated.	The volunteer should be instructed to login to the system and sign the credential and complete any action needed. If these appear to have been stalled (were changed to this status or assigned to the need more than a week ago) or the assignment date is very near, contact the Program Organizer for insight and recommend they contact the volunteer and ask them to log into the portal to resolve the conflict. Upon login, the volunteer will be presented with all credential conflicts for future assignments.
Review	Waiting on the organization's review to decide approval.	Project Director will need to open the credential and either approve it or contact volunteer.
Submitted	Status indicating a credential that integrates with a 3 rd -party – the system passed the request along to them and is waiting to hear back – OR – a native credential where some type of action must be taken by the Administrator. Example: CBC submitted to HireRite.	Someone from the 3 rd party system must review the request prior to VolunteerMatters changing the status. Typically, a credential should not remain in either status for more than 72hrs. If it does, especially for background checks requiring review, you may need to contact the UW Shared Services for this credential for further assistance. It likely means US Shared Services has yet to review and adjudicate the credential.

Change Credential Status

During the course of a program, credential status may need to be updated based upon

- Volunteer submitting file to be reviewed
- Credential submitted in PDF form

Change/Update Credential Status

Approve those credentials where review is required, ie. CPR Certificate or Volunteer Agreement)

- Click on volunteer name to open the volunteer contact profile
- Click on Credential to Edit (right side of screen)
- Select EDIT on credential for volunteer name (bottom of screen)
- Make changes as needed to status/expiration dates (e.g. to Approved) and Save

Criminal Ba	ckground Check
Status	
Submitted	
Expiration D	pate
2028-11-12	2
Admin Note	S
Cancel	Save

Include a note as to why it was Approved

Add Attachment to Credential

Attach a file and/or approve those credentials requiring review, i.e. Volunteer Agreement.

- Temporarily save PDF file
- Click on volunteer name to open the volunteer contact profile
- Click on Credential to Edit (right side of screen)
- Select EDIT on credential for volunteer name (bottom of screen)
- Select Choose Files to upload PDF file
- Change Start Date if needed (to actual certification date) and Save

CPR Certification Must be from American Red Cross or American Heart Association only. Medication Management Should have 5 attachments (unless volunteer included them together)

Start Date						
2024-10-16						
Supporting Documents						
Timestamp	Original Filename					
2024-10-16 19:24:14.0	VA Smith.pdf	⊗ delete				
Upload Supporting Documents Choose Files No file chosen File uploads are limited to 10MB total per submission.						

Non-Compliant Status

For volunteers who do not complete the required assignments, Program Director or Administrator should change the volunteers credential to Non-Compliant.

Once updated, the status can be changed back to Active Reinstated.

- Click on volunteer name to open the volunteer contact profile
- Click on Credential to Edit (right side of screen)
- Select EDIT on credential for volunteer name (bottom of screen)
- Change Status to: Banned This ensures the volunteer cannot be assigned to any other projects. This status can be changed once they comply.

Contact Status						
Contact ID						
BfmmukevSEi1P8oNJiD8xA						
Status						
Banned						
Status Date						
2024-09-30						

 Add a Admin Note (or Status History Note). Status History will be viewable to Program Director; Admin Notes are viewable to only the Administrator.

The Escalation/Incident Note will automatically appear whenever you select BANNED status.

Escalation/Incident Notes									
Individual failed to comply with required CBC and training.									

Save

Monitor Criminal Background Check

CBC Credentials are a little different in that

Criminal Background Checks: individuals who have completed and approved CBCs within HireRite will require a onetime completion of the additional HireRite sign-in to connect VM with HireRite. **Once the volunteer opens the Volunteer Matters link and initiates the CBC Credential, a link will go to HireRite.** HireRite will then send an invitation email link to the Volunteer. The volunteer MUST select this email link as well to start the CBC process.

CBC Support Contact: Angela Schultz 608-262-0826 Angela.schultz@uwss.wisconson.edu

- Volunteers who do not accept the HireRite invitation, the HireRite request will need to be resent
- The duration of a CBC for Day Camps and Residential Overnight Camps is different (2 years vs 4 years)
- Volunteers will receive automated daily reminders from HireRight
- HireRight will STOP the invitation after finding a duplicate invite and return duplicate notification to VM
- UW Shared Services will review the Credential Conflict on the VM dashboard, confirm CBC completion date and no prior convictions, and then update volunteer status to exempt.

A CBC status of "EXEMPT" with an expiration date means that volunteer will be prompted to apply for another CBC on that expiration date.

Shared Services Support Contact:

Angela Schultz, 608-262-0826 Angela.schultz@uwss.wisconson.edu

Resend CBC Invitation from HireRite

If credentialing conflict denotes Incomplete and it is over 21 days you will need to resend the invitation. You must have HireRite access to do so.

- Open HireRite and use the VM HireRite account
 - Select Account:

University of Wisconsin

- Search on individual name
- Right click on the existing order to RESEND THE INVITATION After the second invitation sent, the volunteer has 5 days to respond.

Create New Order in HireRite

In the event of a duplicate order, the initial order may be cancelled. E.g. HR completes an I-9 request for the same volunteer, it will duplicate the initial CBC order, thereby cancelling it. In the Credentialing Status, it will come up under REVIEW STATUS as a duplicate.

- 1. From within VolunteerMatters, cancel the initial CBC credential for that volunteer.
- 2. Open HireRite
- 2. Select NEW ORDER and complete a new order process to resend to volunteer *The volunteer has 21 days to respond.*

Change CBC Expiration Date

Once complete, you will need to verify the CBC date. HireRite automatically is set for 4 years. If you know the volunteer is serving at an overnight camp, you will have to manually change the CBC expiration date for a 2 year mark.

Complete this step for Status: COMPLETED, DENIED, CANCELLED

Contact Angela Schultz for assistance with HireRite issues, such as changing to "exempt" status for someone who has a confirmed CBC in HireRite and sends the request back to VolunteerMatters as failed delivery.

CBCs that Meet Company Standards

If the CBC comes back as "meeting company standards," update the credential status from "Canceled" to "Exempt" and adjust the expiration date per the date when the CBC was approved. Add explanatory note in the "Admin Notes" field. Save the updates.

If the CBC comes back as "meeting company standards," update the credential status from "Canceled" to "Exempt" and adjust the expiration date per the date when the CBC was approved. Add explanatory note in the "Admin Notes" field. Save the updates.

Does Not Meet Company Standards

Refer to CBC Findings Review section.

1.	Open Contacts	6.	Select	t EDIT			
2.	Scroll to specific volunteer	7.	7. Click in Expiration Date field				
3.	Click on their name to open their profile	8.	8. Change year to a two-year expiration (default is				
4.	Scroll to Credentials section (bottom right)		Ī	Criminal Background Check			
5.	Click on Criminal Background Check Credential box to						
	open			Status			
	Volunteer Agreement			Canceled			
	Status: Approved Start: 2024-03-14 Expiration:			Status Timestamp			
	(UW-Green Bay) UWGB Operations Manual			2024-03-19 03:50:11 PM +0000			
	Status: Approved Start: 2024-03-14			Start Date			
	Expiration:			2024-03-14			
	Criminal Background Check			Expiration Date			
	Start: 2024-03-14 Expiration: 2028-03-14			2028-03-14			

CBC Negative Findings Review

CBCs that have been reviewed and do not meet University standards will have their status changed to CANCELLED. CBCs are monitored by Shared Services who will coordinate with the Pre-College Liaison when any negative results are reported.

- Shared Services will monitor the CBC results from Hire Rite
- Status will be changed to REVIEW and send report to Administrator
- Administrator will review against campus HR standards
- Administrator will reply to Shared Services email whether campus will approve the findings

Mee	ets Standards	Does not Meet Standards
•	Shared Services will change HireRite status to MEETS STANDARDS Administrator will change Volunteer Matters status to EXEMPT Administrator will update expiration date (based on 2 or 4 years)	 Shared Services will change Volunteer Matters profile credential status to CANCELLED Shared Services will change HireRite status to DOES NOT MEET STANDARDS or MEETS STANDARDS based on campus decision
1. 2. 3. 4. 5.	Open <i>Contacts</i> Scroll to specific volunteer Click on their name to open their profile Scroll to <i>Credentials</i> section (bottom right) Click on <i>Criminal Background Check</i> Credential box to open	 HireRite Adjudication Process will initiate This process follows the standard HR process for CBCs. If volunteer did not disclose findings, it will be an automatic DOES NOT MEET STANDARDS. HireRite generates letter to volunteer Volunteer may dispute the information on the report to HireRite (it is not a University decision)
	Volunteer Agreement Status: Approved Start: 2024-03-14 Expiration:	 Volunteer will receive second in 5 days if they do not respond to the initial letter from HireRite
	(UW-Green Bay) UWGB Operations Manual Status: Approved Start: 2024-03-14 Expiration: Criminal Background Check Status: Canceled Start: 2024-03-14 Expiration: 2024-03-14 Expiration: 2028-03-14	 Finalize Volunteer Matters status Remove expiration date from volunteer profile Add Admin Notes description as to why Change CBC status to BANNED
6. 7. 8.	Select EDIT Change status to EXEMPT Change Expiration Date Default is 4; change to 2 if an overnight camp volunteer Criminal Background Check Status	
	Canceled	
	Status Timestamp 2024-03-19 03:50:11 PM +0000 Start Date	
	2024-03-14	
	2028-03-14	

As of 2/07/2024

Navigate the System

Change Project Set Up

If you need to update your project setup once you have been assigned and are logged in, follow the <u>Project Set Up</u> <u>PDF</u> or the instructions below.

1. Click "Projects" (Briefcase Icon) from the main menu.



2. Click the "Dashboard" button to the right of the project you wish to edit.

Projects		
Projects Reports -	Show 10 v entries 5	Search:
Published Ends After 2023-11-08	Copy Excel CSV Print Publish Publish Publish Publish Find	sh
End Date after the above value. Clear this field to find projects with all publish end dates. Campus	UW Stout: University of Wisconsin Public 2023-10-25 2030- Volunteer Onboarding	10-25 Dashboard Needs
Select all that apply •	Showing 1 to 1 of 1 entries	Previous 1 Next

3. On the project dashboard, click the "Manage" drop-down button (Manage -) and select "Project Setup".



As of 2/07/2024

🖉 edit 4. Click the "Edit" button () under the project summary panel. Project Setup UW Stout: Volunteer Onboarding Dashboard Manage -Reports -TUW Stout: Volunteer Onboarding We are thrilled to have you join our Show 10 entries Search: team of dedicated volunteers. University of committed to making a positive Wisconsin-Stout impact on our community. Your Impact Metric L Value participation is invaluable to us, and we are excited to work together towards our shared goals. No data available in table There are six types of volunteer roles offered currently for your campus. You Showing 0 to 0 of 0 entries Previous Next should have been instructed by your local campus project administrator for which role you should apply. --AUTHORIZED ADULT -- APPOINTED VOLUNTEER - NON-YOUTH -- DAY PROGRAM DESIGNATED INDIVIDUAL --ONE-TIME YOUTH-SERVING VOLUNTEER --RESIDENTIAL PROGRAM DESIGNATED INDIVIDUAL --RESIDENTIAL PROGRAM HEALTH STAFF Please click Volunteer on the appropriate role below and then "Register Now" to being your volunteer onboarding process. If you have any questions, please do not hesitate to reach out to your local campus project admin. Campus University of Wisconsin Publish Mode Public **Publish Dates** Oct 25, 2023 - Oct 25, 2030 🖉 edit <

Note: you can view the Project Catalog from this screen as well.

5. Edit the Project

Once there you can edit much of the project's core settings and information. Including the project's identification settings (Name, Description, Dates, Images, etc.), extended information (address, cancellation policy, contact info, etc.), individual project settings (volunteer comments, feedback, etc.), and Need Types displayed administratively.

Consult with your Precollege Liaison if you have any questions on what you should or shouldn't modify.

Edit details as needed. It is suggested to confirm the Email listed is the correct name for your campus.

As of 2/07/2024

Project Notifications

Your project notifications will become important as you assign volunteers and manage them. The notifications determine how often you will receive automatic updates and notices when volunteers sign up – or withdraw - from your project.

Project Notifications

Project Summary Email

Daily

Volunteer Sign-Up

Sent when a volunteer signs up for a volunteer opportunity. Text/SMS will only be sent to verified numbers.

None

Volunteer Withdrawal

Sent when a volunteer withdraws from a volunteer assignment. Text/SMS will only be sent to verified numbers.

None

Volunteer Check-In

For projects where check-in is enabled, sent when a volunteer checks in to an assignment from their phone or a kiosk. Text/SMS will only be sent to verified numbers.

None

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Reporting Tools

There are various project reports available to provide information on your project assignments, need configurations, onboarding compliance, etc.. It is the Project Organizer's role to manage the project, including volunteer credentials.

An organizer must be assigned to a project to be able to manage it. If you do not see your project, please contact your precollege liaison.

<u>Click here for more information on VolunteerMatters reports</u>. The most vital reports for you as a Program Organizer are the Assignment Roster and the Credential Conflict reports. For purposes of this SOP, only the Assignment Roster Report instructions are listed in detail within this section.

- <u>My Volunteer History Report</u>
- Assignment Roster Report Across Multiple Projects
- Assignment Roster Report Per Project
- Volunteer History Report Across All Projects
- Volunteer History Report Per Project
- Volunteer History Report Per Contact
- Volunteer Hours Report Across All Projects
- Volunteer Hours Report Per Project
- Project Staffing Levels Report Across All Projects
- Project Staffing Levels Report Per Project

Assignment Roster Report

The Per Project Assignment Roster report allows an administrator or organizer to get a quick snapshot of current and upcoming assignments across a specific project.

The report includes a number of fields pertinent to the assignment such as need name, credentials, age, etc..

This report also allows the ability to add additional contact information to be view-able onscreen as well as via export. If there is a contact field necessary for your report, please contact UW Shared Services for more information.

1. Click "Projects" (Briefcase Icon) from the main menu.



2. Click on the "Dashboard" button next to the project you wish to manage.

Published Ends After	Cany Even						
	сору Ехсег	CSV Print					
2023-11-08				Publish	Publish		
Show all projects with a Publish	Project ↓	Campus	11 Publish 11	Start 1	End 👘	+	
Clear this field to find projects with	O UW Stout:	University of W	/isconsin Public	2023-10-25	2030-10-25	Dashboard	Needs
all publish end dates.	Volunteer						
Campus							
Select all that apply *	Showing 1 to 1 o	of 1 entries				Previous	1 Next

3. On the project dashboard, click the "Reports" drop-down button and select "Assignment Roster".

Dashboard Manage -	Reports -				
🔁 UW-Stout: Youth Camp	Assignment Roster	Project Staffing	g (Next 30 Days)		
TBD	Volunteer Hours (by volunteer) Volunteer History		Under >	Minimally >	Fully >
	Feedback	Positions	0	0	0

This opens the "Project Assignment Roster" page. Displayed onscreen is a tabular list of all current and upcoming assignments across this specific project.

Project Ass			
Dashboard Manage +	eports -		
	Show 10 v entries	Search:	
Include Need Types	Copy Excel CSV Print Email Text		
4 items selected	Start 🚛 End 🕼 Type 🕅 Need	Assignee 1	Comment Pledged
Needs Active On or After	(2023-12-01 2024-03-01 Position Authorized Adult - Youth Camp	Foley, Ian	1
2023-11-13	2023-12-01 2024-03-01 Position Authorized Adult - Youth Camp	Hopwood, Bob	1
Needs Active Before	2023-12-01 2024-03-01 Position Authorized Adult - Youth Camp	Hopwood, Sophia	1
2023-12-13	2023-12-01 2024-03-01 Position Designated Individual - Youth Camp	Scales, Tom	1
Ø Apply Filter	2023-12-01 2024-03-01 Position Designated Individual - Youth Camp	Schwartz, Ronald	1
	Showing 1 to 5 of 5 entries		Previous 1 Next

It will display the main report fields along with any additional contact information configured by VolunteerMatters support for your organization. You can toggle the + sign to expand the information for each assignment.

4. Filter the Results

To further drill down data, filter the onscreen results by matching any of the information on each assignment. Including credential names, assignee name, additional contact field, etc..

- **Need Types** Include Shifts, Positions, Tasks, and/or Items in the search.
- Needs Active On or After Date Defaults to today's date.
- Needs Active Before Date Defaults to one month from today's date.

Filter Report	~
Include Need Types	
4 items selected	•
Needs Active On or A	fter
2023-11-13	
Needs Active Before	
2023-12-13	Ħ
() Apply Filter	

The Program Organizer can either export this information or click-through the need name to manage the assignment or the contact name to access the contact record in question.

Credential Conflict Report

The report will give the Program Administrator a high level view on all assignees on the project where there is a credential conflict. Credential conflicts occur when a volunteer has yet to attain the credentials required for their upcoming assignment. See also *Campus Administrator – Manage Credentials* section.

For assistance with understanding the Credential Conflict Reporting, see also <u>https://support.volunteermatters.com/hc/en-us/articles/360011324053</u>.

To run the report:

1. Click "Projects" (Briefcase Icon) from the main menu.

	=	
Menu & Contacts Projects My Profile	Volunteer Dashboard	

2. Click on the "Dashboard" button next to the project you wish to manage. *NOTE: An organizer must be assigned to a project to be able to manage it. If you do not see your project, contact your precollege liaison.*

Projects Reports -		
Filter Projects 🔷	Show 10 - entries Search:	
Published Ends After	Copy Excel CSV Print	- F
2023-11-08	Publish Publish Project là Campus li Publish i Start li End li	it .
Clear this field to find projects with all publish end dates.	UW Stout: University of Wisconsin Public 2023-10-25 2030-10-25 Volunteer Otheradaria	Dashboard Needs
Campus		Draviaus 1 Navt
O Apply Filter	Showing 1 to 1 of 1 entries	Previous 1 Next

3. On the project dashboard, click the "Reports" drop-down button and select "Credential Conflicts".

Project Dashboard UW-Stout: Youth Camps						
Dashboard Manage -	Reports +					
🔁 UW-Stout: Youth Camp	Assignment Roster Assignment Calendar	Proje	ect Staffing (N	ext 30 Days)		
TBD	Volunteer Hours (by volunteer) Volunteer History			Under >	Minimally >	Fully >
	Feedback	Posit	ions	0	0	0
	Credential Conflicts	Shift	s	0	0	0
Campus	Need Configuration	Tasks	5	0	0	0
UW-Stout	Project Staffing Project Staffing Calendar	Item	S	0	0	0

This opens the "Project Credential Conflicts" page.

This will open a tabular list of all credential conflicts for active and upcoming assignments.

Need Type ↓	Need	1 Need S	Start 🕼 Assign	ee 🕴 Credential N	ame It	Status 📑
Position	Authorized Adult - Camp	Youth 2023-12 AM	2-01 12:00 Hopwoo	od, Bob (Stout) Emerg Programs	gency Management - Day	Missing
Position	Authorized Adult - Camp	Youth 2023-12 AM	2-01 12:00 Hopwoo	od, Bob (Stout) Emerg Programs	gency Management - Residential	Missing
Position	Authorized Adult - Camp	Youth 2023-12 AM	2-01 12:00 Hopwoo	od, Bob (Stout) Incide	nt Reporting	Missing
Position	Authorized Adult -	Youth 2023-12	2-01 12:00 Hopwoo	d, Bob Mandated Rep	porter Training	Incomplete

You can narrow the results by keyword (credential, credential status, etc.) via the search box. For example, I could enter a volunteer's name to narrow the results to an individual or enter a need name to narrow the results to only those who are assigned to a specific type of job.

You can also click through to the assignee's contact record or directly to the project need assignment page.

Default (Starting)	In-Progress	End
Approved: i.e., electronically signed	Review: waiting on the organization's	Approved: Volunteer can proceed with any
agreements.	review to decide approval.	activity. May automatically change from this
		status if there is an expiration policy.
Submitted: typically when integrated with a	Incomplete: waiting update from the	
3rd party - means the system passed it along	volunteer - whether they have not	Denied: After review by an administrator
to them and it is waiting to hear back – OR -	completed the integrated background check	they declined the award of this credential.
a native credential where some type of	or training, or have yet to upload a needed	
action must be taken by the administrator.	file, or the organization reviewed and	Expired: The credential was either
	decided the application was incomplete or	automatically expired by rule or by manually
Review: means someone from the	incorrect and kicked it back to the	by an administrator.
organization must review the application	volunteer. Only to be used for integrated	
prior to giving it a new status.	Learning credentials, legacy integrated	Exempt: The credential is automatically
	background check credentials, and/or those	exempted for the volunteer when they fall
	credentials requiring a file upload.	below the "Age Exemption Limit" setting on
		the credential. This is similar to being
	Missing: The credential is not on the	approved and the volunteer can proceed
	volunteer's contact record. The volunteer	with the project assignment without issue.
	should be instructed to login to the system	
	and sign the credential and complete any	Canceled: An administrator outside service
	action needed.	marked the credential canceled manually.

4. Export Results

Just above the table you can choose to export the results into different file formats or email the volunteers in the list. This will be limited to the results displayed on-screen (considers keyword filters). These exports also include additional contact information for each assignee (email/phone).

Project Credential	Conflicts uw-s	Stout: Youth Camps	
Dashboard Manage - Reports - Show 10 - entries			Search:
Type I Need	Need Start Assign	nee 🕼 Credential Name	Status 1
Position Authorized Adult - Youth Camp	2023-12-01 12:00 Hopwo AM	od, Bob (Stout) Emergency Manage Programs	ement - Day Missing
Position Authorized Adult - Youth Camp	2023-12-01 12:00 Hopwo	od, Bob (Stout) Emergency Manage Programs	ement - Residential Missing

Send Email/Text Message from Per Project Assignment Roster Report

From the Per Project Assignment Roster report, a Program Organizer can contact the list of volunteers via email. The email template does not feature any assignment information and is fully customizable during the sending process. The text template allows up to 140 characters only and will only be sent to <u>verified mobile numbers</u>. You can filter the list via the filter options mentioned above. Once you are happy with the list, click the Email or Text buttons.

Project Assign			
Dashboard Manage - Report	Show 10 v entries	Search:	
Include Need Types 4 items selected	Copy Excel CSV Print Email Text Start L End Type Need	Assignee	Comment Pledged
Needs Active On or After	2023-12-01 2024-03-01 Position Authorized Adult - Youth Camp	Foley, Ian	1
2023-11-13	2023-12-01 2024-03-01 Position Authorized Adult - Youth Camp	Hopwood, Bob	1
Needs Active Before	2023-12-01 2024-03-01 Position Authorized Adult - Youth Camp	Hopwood, Sophia	1
2023-12-13	2023-12-01 2024-03-01 Position Designated Individual - Youth Camp	Scales, Tom	1
C Apply Filter	2023-12-01 2024-03-01 Position Designated Individual - Youth Camp	Schwartz, Ronald	1
	Showing 1 to 5 of 5 entries		Previous 1 Next

Email

From there you can customize the subject and messaging and click Send. If a volunteer appears more than once in the list they will only be sent a single email. For more information on sending an email within the system please <u>click</u> <u>here</u>. This is for the general note tool but the basics are the same.

Email Volunteers	
Köster Report	Email Preview
5 Contacts	Subject: Special Event Subject Update - Important!
Subject Special Event Subject Update - Important!	Dear Program,
Enter the subject for the email. Special Message	Here is my special message. You will need to meet prior to your assignment with your project managers.
• • B / U 8 = = = • • 2	University of Wisconsin
Here is my special message. You will need to meet prior to your assignment with your project managers.	
Enter a special message to be included with the email.	
Send Me Email Results 🗹	
Update Preview Send	

The email utility is limited to 500 volunteers per email. You may need to filter the list or use the search box to limit the results.

Text

From there you can message up to 140 characters. The system will not allow any characters past the original 140. If a volunteer appears more than once in the list they will only be sent a single text.

Message Volunteers	
C Router Report 1 Contacts Message	
Here is my SMS message. You will need to meet prior to your assignment with your project managers.	*
This is the message to send. The message is limited to 140 characters.	

The text utility is limited to 500 volunteers per text. You may need to filter the list or use the search box to limit the results.

Reference: Advertise Your Program

When getting started with your VolunteerMatters system, the following links can be used to advertise your VolunteerMatters system from your website, email, marketing materials, etc.:

Login (for existing volunteers): https://uw.volunteermatters.org

Volunteer Registration (for new volunteers): https://uw.volunteermatters.org/register

Project Catalog (for all volunteers): https://uw.volunteermatters.org/project-catalog

Custom Project Page URLs (for all volunteers): Sometimes you may want to direct or advertise a specific predefined subset of projects and that's where the ability to create custom Project Catalog URLs comes in. <u>Click</u> <u>here for more information</u>.

Project Page URLs (for all volunteers): You can link directly to a specific project page via their project catalog URL from the <u>project dashboard</u> on the administrative side. This URL is beneficial for hidden projects, directing volunteers to a specific project, etc.

Reference: Contact Database Functions

Manage the Contact Database using the <u>VM Database PDF</u> or instructions below.

All Administrators and Project Organizers should have their *Contact Status* changed to Campus Staff. To do so, edit the Contact record and update the Status field.

Manage Contact Profiles

All users may update their own profiles, however, as Administrator, you also have access rights to add, delete, or update user contact profiles.

1. Select Contacts from left menu



Add Nev	w Contact	Upo	date Existing Contact
a. Sele	ect New Contact	a.	Click on existing user name
	View		View
	All Contacts ~		All Contacts
	Page 1 of 3 1 2 3 <		Page 1 of 3 1 2 3 < > 75 total record(s) found. 2. New Contact Name 1. Baughman, Sarah
b Add	Minimum Details		1 Daugiman, Sarah
To s	set up user contact profile; user may update ir profile once they login. Name: First and Last Email Campus (UW-Green Bay) Status Date (will automatically enter today's date once you click in the box)	b.	Scroll to bottom to select Edit Return to List Edit Oelete Bay also select Delete to remove user
c. Save	e	c.	Change details as needed
		Ь	Email baugse03@uwgb.edu

As of 2/07/2024

Using Contact Database

Quick Find

The "Search" field allows you to "Quick Find" contacts by entering any text into the box to search the default quick find fields. These fields include Name, Email, and Organization. Please see the image below for the Search button:

 Contacts Credentials 	Contacts					£	3.1	
🖻 Projects						L		
My Profile	Dashboard Contact	List Send a Note	Tools -					
Project Catalog	View		Items	Search 💙		Page 1 of	2	
Configuration	All Contacts 43 total record(s) found.	~ ·	S 25	← Quick find	Advanced Q	<u>↓</u> 1 2	< >	
M Portal Insights	요 New Contact				Primary			
Security	Name	Campus	Email		Telephone	Mobile	Status	
≰ ^g Account	1 Acardo, John		jacardo@uw	vlax.edu			Staff	<u>Ω</u> View

Advanced Search

The "Advanced Search" allows you to fully filter records "on the fly", essentially creating a temporary list view. Please see the image below for the button location.

Contacts Credentials	Contacts											
Projects										L		
My Profile	Dashboard Contact Lis	it Send a Note -	• Too	ols •								
Project Catalog	View			Items	Search		+		Page	1 of 2		
Configuration	All Contacts	· ·	C	25	✓ Quick find	0	Advanced Q	Ŧ	1	2	< >	
Portal Insights	43 total record(s) found. 요 New Contact											
Security	Name	Campus	Ema	il.		Pri Te	imary lephone	Мо	bile		Status	
	1 Acardo John		iaca	rdo@uwl	av edu						Staff	0.44

This button will open the 'Advanced Search' area, where you will select the Filter Criteria from the "Field" dropdown list and then, depending on the field type, be presented with selections, text fields, date selectors, etc to utilize that criteria. <u>For more information on working with filters click here</u>. In this sample, it is a choose from a list type of field. Once you make your filter criteria selections, you will click the "Add" button.

Contacts					
Dashboard Contact List	Send a Note	e 🗸 Tools 🗸			
Advanced Search 🔺					
Filter Cr teria					
Add New Filter	,	Match Type		Match Values	
Add New Filter	-	Match Type equals	~	Match Values	
Add New Filter Field Campus	~	Match Type equals	~	Match Values UW-Eau Claire UW-Green Bay	
Add New Fiter Field Campus	~	Match Type equals	×	Match Values UW-Eau Claire UW-Green Bay UW-La Crosse UW-Madison UW-Madison	
Add New Filter Field Campus	v	Match Type equals	~	Match Values UW-Eau Claire UW-Green Bay UW-La Crosse UW-Madison UW-Milwaukee	
Add New Filter	·	Match Type equals	~	Match Values UW-Eau Claire UW-Green Bay UW-La Crosse UW-Madison UW-Milwaukee UW-Stevens Point	

Once one filter criteria has been added, you can select an additional criteria from the drop-down and repeat the process as needed. If you wish to remove a criteria you can do so by clicking on the remove icon on the far right of each criteria (*). The Advanced Search also features a "Match Type" with radio buttons for "Match All" and "Match Any". This means that if "Match All" is selected, the contacts must match all of the filter criteria created to be returned in the contact chooser list. If "Match Any" is selected, the contacts returned only have to match one of the existing filter criteria. They do not need to match all to be returned.

Create Views

When searching for contacts via the Contact Database there are a few options available to you that are listed within this section:

- Pre-Configured Views
- Create List
- Edit
- Delete
- Copy

Pre-Configured Views

Quick Find	The "Search" field allows you to "Quick Find" contacts by entering any text into the	e box to search the default quick
	find fields. These fields include Name, Email, and Organization. Please see the image	e below for the Search button:
	Contacts	E. J
	Contacts	
		(<u>• </u>
	Dashboard Contact List Send a Note - Tools -	B
	All Contacts v v C 25 v Quick find • Advanced Q a	$\frac{1}{2}$ $\frac{1}{2}$ $\frac{2}{2}$
	43 total records) found. <u>A</u> . New Contact	
	Primary Name Campus Email Telephone P	Mobile Status
	1 Acardo, John jacardo@uwlax.edu	Staff <u>Q</u> View
	2 Clifton, Prenicia pclifton@uwsa.edu	Staff <u>Q</u> View
Advanced Search	The "Advanced Search" allows you to fully filter records "on the fly", essentially creat	ting a temporary list view. Please
	See the image below for the button location	
	View Items Search	Page 1 of 2
	All Contacts • • C 25 • Quick find • Advanced Q	<u>±</u> 1 2 < >
	윤 New Contact	
	Primary Name Campus Email Telephone I	Mobile Status
	1 Acardo, John jacardo@uwlax.edu	Staff <u>Q</u> View
	2 Clifton, Prenicia pclifton@uwsa.edu	Staff & View
	This button will open the 'Advanced Search' area, where you will select the Filter Cri list and then, depending on the field type, be presented with selections, text fields.	date selectors, etc to utilize that
	criteria. For more information on working with filters click here. In this sample, it is	a choose from a list type of field.
	Once you make your filter criteria selections, you will click the "Add" button.	
	Advanced Search 🔺	
	Match_Type Match All Match Any	
	Filter Criteria	
	Add New Filter	
	Field Match Type Match Values	
	Campus v equals v UW-Eau Claire	
	UW-Green Bay	
	UW-Madison	
	UW-Stevens Point	
	UW-stout	

Once one filter criteria has been added, you can select an additional criteria from the drop-down and repeat the process as needed. If you wish to remove a criteria you can do so by clicking on the remove icon on the far right of
each criteria (). The Advanced Search also features a "Match Type" with radio buttons for "Match All" and "Match Any". This means that if "Match All" is selected, the contacts must match all of the filter criteria created to be returned in the contact chooser list. If "Match Any" is selected, the contacts returned only have to match one of the existing filter criteria. They do not need to match all to be returned.
Dashboard Contact List Send a Note - Tools -
Advanced Search A
Filter Criteria 1. Campus is one of (UW-La Crosse, UW-Green Bay)
Field Select One V

Create List Views

List Views allow Contact Administrators to create views into the database based on a filter criteria they create and also permits them to set to contact fields desired as columns in the resulting view. List Views are for those types of searches the administrator or organizer will use over and over again. Only Contact Administrators can manage List Views. Organizer Administrators will simply be able to use pre-existing shared List Views.

Contacts								Ę	J.		1
ashboard Contact List Ser	nd a Note -	То	ools -	Consch				Dogo	1 of 2		
All Contacts	~ .	C	25	Quick find	0	Advanced Q	Ŧ	1	2	< >	
II Contacts iontacts - Active iontacts - Banned iontacts - Exit iontacts - Hold iontacts - Staff iontacts with Site Users		Em	Email		Pri Te	imary lephone	Mobile			Status	
ampus Contacts		jaca	ardo@uwla	x.edu						Staff	<u>گ</u> Vie
Contacts - UW-Green Bay Contacts - UW-La Crosse		pcli	fton@uwsa	a.edu						Staff	요 Vie
Contacts - UW-Madison Contacts - UW-Milwaukee Contacts - UW-Stevens Point		kco	ok@uwsa.	edu						Staff	요 Vie
Contacts - UW-Stout Registrants New Contacts - This Month		MIC	MICHELE.CURRAN@WISC.EDU							Staff	요 Vie
New Contacts - This Week New Contacts - Today Support List View	ns •	ljdo	ocken@gm	ail.com	(60	08) 235-9643				Active	요 Vie
Docken, Lorie		Ido	cken@uws	a.edu						Staff	요 Vie

Once the List View is defined, it is available in the List View drop down either as a view that is available to all or as a private view which is unique to the user creating the view. If shared, all campuses will see the list view, however they will not be able to access contacts outside of their campus.

If you do create shared list views for your Program Organizers, please enter your campus short name (e.g., "Stout") under the group field).

- 1. Log into your VolunteerMatters system with the Contact Administrator role.
- 2. Navigate to the Contacts page.

3. Click on the "v" button () next to the drop-down list to expand the options and then click "New View".

View			Items		Search				Page	1 of	2	
All Contacts	~	- 0	25	~	Quick find	0	Advanced Q	Ŧ	1	2	<	>
43 total record(s) found. 요 New Contact		🖍 Edi	t View by View									
Name	Campus	Nev	v View	+		Pri	imary Jephone	Mol	bile		Sta	tus

4. This will open the "List View Configuration" screen. Here you can enter a Name, Group Name, Description and Visibility (whether you want it for all administrators or just you).

Name	List View Name
Group Name	List View Group Name
Description	List View Description
	The description is limited to 255 characters.
Visibility	○ shared

5. The filter will default to the filter of the first List View in your list view drop-down. To change, click 'Edit' on the List Filter.

Visibility	shared O private	
List Filter 🖌 Edit 🕌	or the following are true:	
	1. Contact Standing is one of (ACTIVE)	
	1. contact standing is one of (ACTIVE)	

6. To remove default criteria click the X next to it.

List Filter		
Match Type	● Match All 🔿 Match Any	
Filter Criteria	1. Campus is one of (UW-Eau Claire)	¢

7. To add a new criteria, select from the "Field" drop-down what criteria you would like to filter by, select the "Match Type", and then enter/select the criteria values and click "Add".

Filter Criteria Add New Filter Field Match Type Status Status Classifier Criteria Match Type Status equals Classifier Criteria Banned Exit Felony Hold Hold	Match Type	Match All O Match Any	
Add New Filter Field Status Status Add New Filter Match Type Status Add New Filter Hatch Type Status Add New Filter Hatch Type H	Filter Criteria		
Field Match Type Status Status equals Graduate Control of the status Sta	Add New Filter		
Status equals Carbon Active Active Banned	Field	Match Type	Status
Banned Exit Felony Hold Hold	Status	~ equals	~ 🗆 Active
Exit Felony Hold Hold			Banned
			Exit
			Felony Hold
			Hold
		+ Add	

 Repeat for any additional filter criteria, then when ready, click "Save". This will return you to the main "List View Configuration" screen with your new filter displayed. Please see the article <u>"Working with filters."</u> for more information.

9. To add columns displayed in the List View you can simply drag and drop those fields from the "Available View Fields" group to the "Chosen View Fields" group and vice versa to remove columns/fields. You can drag and drop within the "Chosen View Fields" group to change the order of the columns in the list view.

hosen View <mark>Fi</mark> elds	Available View Fields	
Profile Photo	Standing	^
Name	Status Date	
Email	Organization	
Home Telephone	Birth Date	
Mobile Telephone	Contact Since	
Status	Parent Contact	

10. Choose the sort order (which is usually "Name") by dragging additional fields from the "Available Sort Fields" group to the "Chosen Sort Fields" group and vice versa to remove columns/fields. The field listed first will be the first field sorted by and then down the line if multiple sort fields are selected. You can drag and drop within the "Chosen Sort Fields" group to change which sort is applied first.

Chosen Sort Fields		Available Sort Fields	
Name	Reverse	Contact ID	Reverse
(3	Standing	Reverse
		Status	Reverse
		Status Date	Reverse
		Email	Reverse
		Organization	Reverse 🗸

- 11. The default display order will be "Ascending". If you wish to utilize a "Descending" display order you will just need to check "Reverse" on the field in the "Chosen Sort Fields" group.
- 12. Click "Save" and then "Return to List".

Edit List Views

- 1. Log into your VolunteerMatters system with the Contact Administrator role.
- 2. Navigate to the Contacts page.
- 3. Select the list for which you wish to edit as the current list view.
- 4. Once loaded, click on the "v" button () next to the drop-down list to expand the options and then click "Edit View".

Dashboard Contact Lis	t Send a No	ot -	Tool	ls 🕶									
View			I	tems		Search				Page	1 of	2	
All Contacts	~	-	C	25	~	Quick find	0	Advanced Q	Ŧ	1	2	<	>
43 total record(s) found.		∕ E	dit Vie	ew <	+								
Name	Campus	N 1	lew Vie	ew			Pri Te	imary lephone	Mol	bile		Sta	tus

5. To edit you can change the Name, Group, Description and Visibility (whether you want it for all administrators or just you) and click "Save" and then "Return to List".

- 6. To edit the filter, click 'edit' on the List Filter and then delete and/or add criteria by clicking the X's or selecting from the drop-down what you would like to filter by and enter the criteria and click "Add". Then click "Save" and then "Return to List". Please see the article <u>"Working with filters."</u> for more information.
- 7. To edit the display columns, you can simply drag and drop those fields from the "Available View Fields" group to the "Chosen View Fields" group and vice versa to remove columns/fields. You can drag and drop within the "Chosen View Fields" group to change the order of the columns in the list view.
- 8. To edit the sort order, you can simply drag and drop fields from the "Available Sort Fields" group to the "Chosen Sort Fields" group and vice versa to remove columns/fields. The field listed first will be the first field sorted by and then down the line if multiple sort fields are selected. You can drag and drop within the "Chosen Sort Fields" group to change which sort is applied first.
- 9. Click "Save" and then "Return to List".

Delete List Views

- 1. Log into your VolunteerMatters system with the Contact Administrator role.
- 2. Navigate to the Contacts page.
- 3. Select the list for which you wish to delete as the current list view.
- 4. Once loaded, click on the "v" button () next to the drop-down list to expand the options and then click "Edit View".

Dashboard	Contact List	Send a N	ot -	Тс	ols -									
View					Items		Search				Page	1 of	2	
All Contacts		~	•	S	25	~	Quick find	0	Advanced Q	Ŧ	1	2	<	>
43 total record(s) fo 요 New Contact	und.		/	Edit V	/iew View	+								
Name		Campus	Ŀ	New	View	_		Pri Te	imary lephone	Mol	bile		Sta	atus

5. Scroll down to the bottom of the List View and click the "Delete" button.



6. You will be presented with an "Are you sure?" window, click "Yes, delete" to delete the view or "Cancel" to not delete.



Copy List Views

- 1. Log into your VolunteerMatters system with the Contact Administrator role.
- 2. Navigate to the Contacts page.
- 3. Select the list for which you wish to copy as the current list view.
- 4. Once loaded, click on the "v" button () next to the drop-down list to expand the options and then click "Copy View".
- 5. The new list view will open up in the "List View Configuration" screen with the name of "Copy of", where "..." is the name of the list view you copied. Continue with instructions for editing a list view.

Dashboard C	Contact List	Send a N	ot -	То	ools -										
View					Items		Search				Page	1 of	2		
All Contacts		~	-	C	25	~	Quick find	0	Advanced Q	Ŧ	1	2	<	>	
43 total record(s) for	ind.		1	Edit V	/iew										
Zi new contact			Ø	Сору	View <										
			1	New Y	View			Pri	imary						
Name		Campus		be I I I		_		те	lephone	Mo	bile		Sta	atus	

This may seem like more work, but after the initial lists are complete it will give you a much greater amount of customization and control over the lists of data found within your VolunteerMatters system and are easily exported to a CSV spreadsheet.

Click here to learn about exporting list view results.

Reference: Job Aid Resources

The following job aids have been contained within this SOP and are listed here for easy review on specific matters.

- VolunteerMatters Portal Overview: <u>https://docs.google.com/document/d/1Gkybf4J2mDhb6p7A0yL5i_v-tlY13-</u> <u>SAyw2zLPpBxHo/edit?usp=sharing</u>
- VolunteerMatters Precollege Liaison Adding Organizers to a Contact and Assigning Organizers to Projects: <u>https://docs.google.com/document/d/1Y-</u> SKEyFu6X6ltbbW0LZYigRvG7kmSo57alwZoUwAlqQ/edit?usp=sharing
- VolunteerMatters Precollege Liaison Project Creation: <u>https://docs.google.com/document/d/115CSnwoImI7cZYJnwIV-k0kwRZX6ALWcUJ9kUuUvlhI/edit?usp=sharing</u>
- VolunteerMatters Precollege Liaison Risk Management Guide (Credential Administration, Policy Auditing, Standard Risk Profiles) <u>https://docs.google.com/document/d/1APOC7kPnye-</u> Zppf4YlgLMQq7TinpM1ybVWpo RNNLwl/edit?usp=sharing
- VolunteerMatters Precollege Liaison Risk Management Guide (Requesting Additional Custom Credentials): <u>https://docs.google.com/document/d/1fIFgLJCnN50cxq37Bkny0x5R_soUy47_FEXs_59zEvoM/edit?usp=sharing</u>
- VolunteerMatters Precollege Liaison Contact Database: <u>https://docs.google.com/document/d/1XN7SMQgSytqzPE5tG8dCiTvR65zPB9jbTITjqN</u> <u>iB52c/edit?usp=sharing</u>
- VolunteerMatters UW Shared Services Adding Administrative Roles (and Contact Segment/Branch Restriction) to a Contact: https://docs.google.com/document/d/10qB8Nx6B0lURrqsn3rnFtOBARdy4Zcfl3lqgllR42p4/edit
- VolunteerMatters Volunteer Quick Guide: <u>https://docs.google.com/document/d/1H-</u> Fc7cTVWympYwZao7XRMD6B7PFA4Z1VW1Jsx3JtrQ4/edit?usp=sharing
- VolunteerMatters Program Organizer Project Management: <u>https://docs.google.com/document/d/1jndBo1pGDdblh4ir3bq0mG-</u> <u>IWNXyRmVUCkbGN9v2W5k/edit?usp=sharing</u>
- VolunteerMatters Program Organizer Contact Database: <u>https://docs.google.com/document/d/1gEByup5GR__8d8bqXeRogdxAHLdlvcwMzX1VdTkeGic/edit?usp=sharing</u>

Reference: Hire Rite Adjudication

This process reflects how the Volunteer Matters and Hire Rite Systems work together to complete a volunteers Criminal Background Check.

Volunteers have 21 days (although notice says 5) to utilize the link to complete a criminal background check, otherwise the access will expire.

The volunteer MUST accept the HireRite invitation (in addition to the VM invitation) to initiate HireRite.



Reminder: update CBC expiration to two (2) years if volunteer serving at an overnight program activity.

As of 2/07/2024

Reference: Project Catalog

The Project Catalog can be viewed from the Project Dashboard.

1. Click "Projects" (Briefcase Icon) from the main menu.

=	
	The second secon
Volunteer Dashboard	k
E 18 ROJECTS 39 VOLUNTEERS	
	■ Volunteer Dashboard

2. Click the "Dashboard" button to the right of the project you wish to edit.

Projects Reports -		
Filter Projects 🛛 🔺	Show 10 ~ entries Search:	
Published Ends After	Copy Excel CSV Print	
2023-11-08	Publish Publish	
Show all projects with a Publish	Project 🌡 Campus 🕴 Publish 🕴 Start 🕼 End 🕼 🚽	
Clear this field to find projects with all publish end dates.	UW Stout: University of Wisconsin Public 2023-10-25 2030-10-25 Dashboa	rd Needs
Campus	Onboarding	
Select all that apply 👻	Showing 1 to 1 of 1 entries Previou:	s 1 Next
Apply Filter		

3. Scroll down to the Project Catalog URL and click to open and view.

🔁 Test	
Test II	Γ Γ Γ
	<u>`w</u>]
Campus	
UW-Platteville	
Publish Mode	
Public	
Publish Dates	
Dec 20, 2023 - Feb 29, 2024	
Project Address	
1 University Plaza	
United States	
Geolocation	
Project Catalog URL	
https://uw.volunteermatters.org/project-catalog/61	

Reference: Volunteer Guide

This section provides an instructional handout to aid volunteers in completing their profile responsibilities. Volunteers may use the Volunteer Quick Guide or see information below.

Once you have created a login and your profile, every time you visit Volunteer Matters you can view your assigned activities, update your profile, or find a new volunteer opportunity.

Create Login Registration Profile

Visit the <u>VolunteerMatters</u> link to complete this process.

1. Create a Login

External UWGB	UWGB User
 Select REGISTER NOW (at bottom) 	Select LOGIN for UW Employees and
Need an account?	Students
Register Now	Use your assigned UW NET ID
Enter email and CLICK HERE	username/password
Create Your Login Information	
Email	Do not create a new profile
jewinymbili yn a'i cam	Logia for LIW Employees and Students
Please provide the email address you wish to associate with your account. We have a volunteer record on file for that email address. If this is your email, please click here.	Login for ow Employees and Stadents
	Need an account?
Use the email account that you received instructions	Register Now
from. Do not use a different email as this will create a	
NEW PROFILE and you will not see your assigned	Once complete your dashboard
training If you use a different email account, notify	will reflect trainings assigned to you
maines@uwgb.edu as this will change your view.	will reflect trainings assigned to you
 You will receive a message to return to your email and click the new link to energy a personalized registration LIPL 	
We already have a record in our databate associated with your email address. We've sent you an email ad	
to continue your registration.	
If you do not see the email within a few minutes, please check your spam folder.	
 Create your username and password 	
And add basic profile information and CONTINUE	
Create Your Login Information	
Email	
Disease provide the appell address use with to preveating with course present	
Please provide the emain address you mish to associate with your account.	
Please enter your desired username.	
Password	
Once complete, your dashboard will reflect trainings	
assigned to you.	

2. Criminal Background Check: You will receive an additional email from HireRite that you MUST accept to initiate the CBC that may be assigned to you.

Monitor /Complete Assignments on the Dashboard

Upon login, the Volunteer Dashboard will automatically open. Actions/requirements waiting for completion by volunteer will be prominent on the screen. You may also scroll to My Assignments to view volunteer opportunities – or projects – that you have requested to be part of.

In some cases, you will have 5 days to respond before access is removed, as when completing the Criminal Background Check. Continue or Complete Application to initiate the assignment actions.

× ×	■ VolunteerMatters Test System	
Menu 윤 Contacts 윤 Credentials 한 Projects	Volunteer Dashboard	Missing Credentials One or more credentials required for volunteering are missing Incomplete Credentials One or more credentials require your attention
My Profile Project Catalog Configuration	Volunteer Orientation Please visit the training center to view the orientation video. Continue	
 Portal Insights Security 	Child Abuse Prevention and Mandated Reporter Training Please visit the LMS to continue your learning experience. Continue	

You will also be able to view any announcements or search for other volunteer opportunities.

Update Volunteer Profile

Once registered, a volunteer should keep *My Profile* updated with the most current information, such as a mobile phone number, set notification preference and view your volunteer history and completed credentials. The following links provide additional instructions:

Verify Mobile Numberhttps://support.volunteermatters.com/hc/en-us/articles/360053314274Set Preferenceshttps://support.volunteermatters.com/hc/en-us/articles/360053324954

My Profile Project Catalog Logout	My Profile Rhee, Glen	2
0	My Profile History Preferences 3	
	My Information	My Volunteer Totals 5
	Edit	P 1
	User Information	PROJECTS
	Name	1
	Rhee, Glen	
	Birth Date	
	Campiis	
		My Volunteer History
	Contact Information	My Assignments
	Email	Project: UW Staut: Valuateer Ophearding
	tom+grhee@volunteermatters.com	Position: Day Program Designated Individual When: Oct 25, 2023
	Address	
	Primary Telephone	My Credentials 🕜
	Mobile Universities	Randated Reporter Training Status: Approved Statt: 2023-11-00 Expiration: 2025-11-00
	A mobile phone number must be verified in order to receive communication via text message.	Preventing Sexual Harassment and Violence Training Starts: Approved Starts: 2025-11-08 Expiration: 2025-11-08
	Emergency Contact Information	
	Emergency Contact Name	Status: Approved Status: Approved

Find a Volunteer Opportunity

The <u>Project Catalog</u> contains all active and published volunteer projects that have current/future needs. Needs may include volunteers to work shifts, contribute items, perform tasks, or take on a longer-term position. Positions are also used for onboarding of different volunteer types.

To sign-up for a volunteer opportunity, **select an opportunity from the Project Catalog** – or - **use the invitation link** provided by your Program Organizer. The *Project Catalog* is located under the Menu on left side of screen. Follow the steps below:

Project Catalog Self- Selection	Invitation Link
 Open the Project Page 	 Open invitation sent by Program Organizer
 Select the Campus you are interested in 	 Click the Volunteer button on the
 Locate a project and select Learn More 	onboarding position
 Click the Volunteer button on the 	 The Need Sign-Up page will open
onboarding position; if you see "fulfilled"	 Complete credentials required
that position is not available	
Camp Director Fulfilled	Your credentials will only appear at the onset of
 The Need Sign-Up page will open 	login. If you move to your dashboard or profile,
 Complete credentials required 	the assigned credential actions will no longer be
	visible and you will need to logout and login
You MUST complete the credentials before the	again.
system will sign you up for a project.	

Users may return to the dashboard at any time by clicking the logo at the top-left of the screen.



Upon completion of the credentials (assignments) you will be automatically signed up for the position selected.

Reference: Volunteer Required Training List

The list below reflects the required credentials training within Volunteer Matters that UWGB has determined meets UW System 625 requirements for camp volunteer positions.

Training	Completed	Volunteer	Youth Camp Staff/Volunteers			
	Via		Camp	Health	Camp	Volunteer
			Director	Supervisor	Staff/Volunteer	Exception
CBC	HireRite	If POT	Х	Х	Х	
CPR Certificate	Upload		Optional	Х	Supervisor Reqd	
Medication Management DPI	Upload		Optional	Х		
Youth Protection Videos (3)			Х	Х	Х	
Camp Operations Manual	Check Box		Х	Х	Х	
Youth Event Agreement	Check Box		Х	Х	Х	Х
Youth Event Agreement Minor						
Volunteer Agreement	Check Box	Х	Х	Х	Х	
Archery Certificate	Upload				Optional	
Lifeguard Certificate	Upload				Optional	
Driver Authorization			Х	Optional	Optional	

Volunteer Exception is an individual who is only serving for a specific non-custodial task, such as at a registration table or hallway guide and will have no direct contact with youth.

Reference: General Volunteer Processing

The Volunteer Matters system will be used for general volunteers who are not part of a youth activity. This process is unique to the steps outlined in ensuing sections and is as follows:

Use this process when an individual is volunteering at UWGB event or program where no compensation is provided and is not a youth activity. In some circumstances, a general volunteer may also be a temporary employee.

This volunteer is NOT involved in youth activities but may have a POT that requires a criminal background check.

Department	 Complete a Volunteer Agreement, marking if volunteer is a POT Forward to Administrator 					
Administrator	 Add individual as a contact in Volunteer Matters Open Volunteer Matters Project: General Volunteers Non Youth Assign Volunteer to General Volunteer 2025 or General Volunteer POT 2025 					
	Dates 👫 Name					
	Aug 08, 2024 - Aug 31, 2025Wellness Center Volunteer					
	Sep 01, 2024 - Aug 31, 2025 Tiny Earth Volunteer					
	Jan 01, 2025 - Dec 31, 2025 General Volunteer in POT 2025					
	Jan 02, 2025 - Dec 31, 2025 General Volunteer 2025					
	Create a new credential depending on volunteer activity (e.g. Wellness Center) Each January you will need to create a new credential for the new year					
	 Attach volunteers PDF Form to the Volunteer's Contact Profile for the Volunteer Agreement credential that was assigned to them in prior step 					
	 Email contact if they are a POT for the criminal background check; see next page for example of email instructions 					
Volunteer	Receive email from Administrator and complete the assigned action steps.					

Volunteers in POT Email Request

Thank you for volunteering for activities at UWGB. UGWB uses the VolunteerMatters platform to document our volunteer activity. We would ask that you visit the <u>VolunteerMatters</u> link to register and complete the criminal background check. You will not be approved for this activity until this has been completed.

1. Create a Login

External UWGB		U٧	UWGB User		
•	Select REGISTER NOW (at bottom)		Select LOGIN for UW Employees and		
	Need an account?		Students		
	Register Now	•	Use your assigned UW NET ID		
_	Enter erreit		username/password		
•	Enter email				
	from Do not uso a different email as this will create		Do not create a new profile		
	a NEW PROFILE and you will not see your assigned				
	training If you use a different email account notify		Login for UW Employees and Student		
	maines@uwgb.edu as this will change your view.				
			Need an account?		
-	Enter a username and password		Register Now		
	Create Your Login Information				
	Email				
	Please provide the email address you wish to associate with your account.				
	Username				
	Please enter your desired username.				
	Password				
	¢				
Upc	n entering this information, the system will recognize				
you	r email and you will be sent a new email with a				
personalized registration form URL (Registration Portal)					
to complete the registration form.					
	-				
Once complete, your dashboard will reflect trainings					
assi	gned to you.				

2. Criminal Background Check: You will receive an additional email from HireRite that you MUST accept to initiate the CBC that may be assigned to you

If you have any questions or need more information about the volunteer registration process, please don't hesitate to reach out to me at 920-465-2781 or maines@uwgb.edu.

Your involvement and commitment are highly appreciated, and we look forward to working with you.

Marinette Theatre

The Marinette Theatre is a public program that is not within the Youth Protection Policy. However, to maintain youth protection, we have set the following for these productions:

Program Director	Marinette Theatre Manager	
	Lauryn Albaugh	
	 Criminal Background Check 	
	 Youth Agreement 	
	 Prohibited Conduct 	
	 Mandated Reporting 	
	 Youth Protection 	
Crew – Paid	All crew will have a Criminal Background Check	
	 Criminal Background Check 	
	 Volunteer Agreement (forwarded by Program Director 	
	and uploaded to VolunteerMatters)	
Crew – Unpaid	Volunteer Agreement (forwarded by Program Director and	
Limited Volunteers	uploaded to VolunteerMatters)	